Financial Advisor

Cornerstone Financial Advisors and Cornerstone Tax Services have been a premier wealth management and tax planning firm in eastern Idaho for decades. We specialize in tax-focused wealth management for business owners and individuals. Our main focus is our clients! We work together as a team to provide the best possible experience as we help our clients manage their money, time, dreams and goals.

***Position Description:***

As a Financial Advisor, you will service existing and new client relationships with the goal of assisting each client in making wise financial decisions. The advisor will listen, identify, evaluate, communicate, and implement strategic financial decisions with the client and team members alike. Expertise will span investments and all areas of financial planning as well as qualified retirement plans.

In addition to working client specific responsibilities, the advisor will be a great addition to our team and play an integral role in carrying out company initiatives, strategic planning, service enhancements, technology advancements and marketing initiatives.

***Position Responsibilities:***

* Development of Comprehensive personal and business financial plans
* Advise clients on the full range of financial planning areas, including cash flow management, debt management, retirement planning, estate planning, real estate analysis, insurance evaluation, employee benefits review, tax analysis, investment management and education planning
* Utilize available software effectively. Experience with Redtail, Riskalyze, NetX360, MoneyGuide Pro and other relevant industry software is preferred
* Provide education to help clients meet their goals and achieve financial health.
* Navigate the complexities of tax planning and assisting clients in optimizing their personal tax situation
* Provide support to plan sponsors and trustees as well as education/enrollment services to retirement plan participants
* Participate in weekly staff meetings and interact with the rest of our team to improve procedures and grow the firm.

***Qualifications:***

* Bachelor’s degree required. Finance, Accounting or Business degree preferred.
* CFP® or comparable designation preferred
* 3+ years’ experience in financial planning particularly qualified retirement plans and tax planning
* Outstanding written and verbal communication skills. Demonstrates poise, confidence, and financial literacy
* Strong computer skills. Proficient in MS Office products as well as experience utilizing a contact management system (CRM). Experience with Redtail, Riskalyze and MoneyGuide Pro preferred.
* Strong work ethic, self-motivated and be able to have excellent collaborative and interpersonal skills. Must be reliable and detail oriented.
* Passionate about helping clients
* Must be ethical and compliant to industry regulations