Director of Financial Planning:

Grove Street Fiduciary (www.grovestreetfiduciary.com) is seeking a Director of Financial Planning for our fee-only financial planning and investment advisory firm in Peterborough, NH. We are very interested in you if you have a master's degree in Financial Planning and some experience in Wealth Management.

This position provides an opportunity to advance within a quickly growing firm that does not make sales calls, but instead focuses on nurturing our existing client relationships. The ideal candidate will have a strong desire to begin working with clients immediately, and actively shape the future of a small but rapidly growing firm.

The most important attribute of the successful candidate is the desire and ability to relate and communicate with clients.

Responsibilities include, but are not limited to:

- Develop a financial planning protocol and process.
- Have responsibility for direct client relationships.
- Have the leadership ability and desire to train new advisors.
- Analyze, research, and implement financial solutions with clients;
- Demonstrate excellent people skills by being confident in the delivery of advice to clients via conference call or face-to-face meetings; excellent verbal and non-verbal communication a necessity
- Maintain high ethical standards/confidentiality at all times
- Prepare, coordinate, and follow through on any needed communication with new or existing clients
- Continuously monitor clients' financial situations with detail and accuracy with the ability to the look at the big strategic financial picture
- Meticulously prepare meetings - approximately 2-3 interactions per client per year
- Research various financial topics as it applies to client situations.

Benefits:

- Competitive compensation of $100,000 per year including a 4% match on a 401(k), $100,000 of term life insurance, long-term disability insurance, health insurance, generous vacation time, and holidays
- Expect the successful advisor's salary to double in five years
- Certain relocation expenses (to be discussed in more detail when offer letter is presented)
- Mentorship and learning opportunities
- Great working environment with professional growth opportunities.

Required Qualifications:

- Will consider candidates in all stages of CFP certification, but certificant preferred
- Master's Degree (or a Master's Degree candidate) from accredited institution preferably in Financial Planning, Finance, Accounting, Taxation or Business
- Passionate about the financial planning industry and aspirations for a long-term career path
- Professional and knowledgeable about financial planning
- Knowledge of the securities industry, financial planning and investment management

- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet, and follow through with client's needs and requirements
- Must be a self-starter and a problem solver
- Must interact effectively with office staff and be a goal-oriented team player
- Strong attention to detail
- Must demonstrate excellence in organizational and time management skills
- Able to perform multiple tasks efficiently and accurately
- Able to meet deadlines and deal with the uncertainty of market fluctuations
- Exceptional phone and client service skills, positive and upbeat attitude at all times
- Ability to take initiative, no matter how big or small the task

Please send a resume and cover letter to info@grovestreetfiduciary.com if interested