

JOB DESCRIPTION

Title: Financial Planning Associate

Supervisor Title: Director of Financial Planning

JOB SUMMARY

The Financial Planning Associate is an entry level position that provides technical and client service support for Financial Planners and Advisors. Responsibilities include preparation and follow-up on client meetings, data gathering, financial plan and scenario modeling, and presentation development. Associates may participate in client meetings but not in an advice or decision-making capacity.

JOB RESPONSIBILITIES

Responsibilities include but are not limited to:

- Provide support for development of comprehensive financial plans by gathering data, completing analysis, and prepare financial planning applications
- Work with allied professionals on the client's behalf as necessary to develop and update financial plans as well as fulfill client's requests
- Attend client meetings in a technical and support role. Manage meeting notes and action items
- Execute client tasks and exhibit timely communications with them
- Other projects and research at the discretion of Advisors and Financial Planners, including Business Partner collaboration and execution of internal initiative tasks
- Preparing and processing client transactions with our custodian

JOB REQUIREMENTS

Education:

Bachelors degree and completion of a CFP Board registered Certificate Program required.

Holding CFP Certification is preferred but not required. Must be working towards CFP Certification.

Other:

- Team player, collaborative, able to work with and through others
- Highly proficient technical skills with the ability to analyze quantitative and qualitative information
- Ability to make effective decisions using impeccable ethical judgment
- Excellent verbal and written communication skills
- Strong client service skills
- Detail-oriented, accurate, organized, able to set priorities
- Results driven, with the ability to take initiative
- Desire to engage in continuous learning to ensure currency of knowledge and skills