RHP ROYALHARBOR PARTNERS
Wealth Management

Level 2 Financial Planner

Reports to: Financial Planning Team

Location: Houston, TX

Benefits: Yes, 100% employer paid medical, dental, vision

Status: Full-Time with 90-day Introductory Period

Posting date: November 1, 2021

Close date: December 15, 2021

Firm overview:
Royal Harbor Partners is an experienced investment management firm specializing in multi-generational wealth management. We value people over money, treating our clients like family. Our priority is to create a solid financial plan that steers and transforms our client's wealth while exemplifying the utmost integrity and the highest standards of professionalism. Our clientele exists of executives, business owners and families.

We work in a friendly and supportive environment with established career paths and plenty of opportunities for long-term growth and advancement.

Job Summary:
The Associate Advisor will provide support for senior financial advisors in areas of financial planning, relationship management and compliance. Your responsibilities include proactive client engagement, financial plan construction, scheduling and attending client reviews, compliance reports and documentation processing.

Key Accountabilities:

- Successfully manage assigned client relationships, resulting in a high client retention rate for firm
- Support senior advisors in creating and maintaining client financial plans and reports using various software programs such as Money Guide Pro, Asset Map, Precise FP, and Orion.
- Build and deliver customized, comprehensive, and approved financial plans in a manner that's understandable to clients. This position also teams up with clients' tax, legal, insurance, and other professionals to provide comprehensive and aligned financial services.
- Delivering accurate presentations, providing reviews, and answering and responding to client inquiries within 48 hours.
- Stay abreast of industry and regulatory updates, the economy and financial markets, and fraud and cybersecurity threats
- Have a real passion for providing top-notch service, with the ability to effectively interact directly with clients
- Possess excellent active listening and communication skills and can reassure people and put them at ease

- Are accountable, motivated, upbeat, and positive team member
- Exhibit problem-solving acumen and can identify and execute solutions that effectively resolve issues
- Have proven analytical and organizational skills and strong attention to detail, accuracy, and deadlines
- Have the aptitude to quickly learn new technology tools and platforms
- Are dedicated to a career as a Registered Investment Advisor
- Possess a fiduciary mentality, always doing what's best for the client and maintaining confidentiality in all matters
- Assists in implementing the firm's compliance program, under the direction of the designated Chief Compliance Officer.
- Are adept at addressing clients' needs and educating them on financial strategies and tips for fraud and cybercrime prevention

Qualifications:

- Have a client-first attitude with a keen focus on delivering service beyond expectations.
- Possess a keen eye for detail and are accurate, organized, and can set priorities appropriately.
- Capable of learning new technologies.
- Exhibit strong ethics and dedication to maintaining high confidentiality of firm and client data.
- Are responsive and effective communicators, verbally and in writing, who build trusting and supportive relationships with all levels of firm employees, as well as with clients.
- Are highly professional and mature and will serve as a positive role model for their team.
- Are self-starters who take initiative.
- Have developed advanced problem-solving acumen.

Education and Experience:

- Bachelor's degree
- Preferred CERTIFIED FINANCIAL PLANNER® designation (or demonstrated progress toward earning it)

Salary and Benefits:

- Base salary commensurate with experience, in the range of $45,000-$50,000.
- An opportunity for performance-based incentive compensation.
- Benefits including paid dental, vision, health care; 401(k) plan; Paid Time Off on accrual basis
- Annual performance reviews and salary appraisals
- A fun, positive team environment.