Prosperion Financial Advisors

Job Title: Financial Planner
Department/Group: Prosperion Partners
Location: Greenwood Village, CO
Level/Salary Range: $50,000 to $90,000 depending on experience.
Job Category: Financial Services
Travel Required: Minimal
Position Type: Full-time
Job Code/Req#: 

Location: Greenwood Village, CO
Travel Required: Minimal
Level/Salary Range: $50,000 to $90,000 depending on experience.
Job Category: Financial Services
Position Type: Full-time

HR Contact: Brannon N. Brown
Date Posted: 05/24/2021
Posting Expires: When Filled
Will Train Applicant(s): Will train applicant
External Posting URL: https://prosperion.us/financial-advisors/morrison-group/
Internal Posting URL: https://prosperion.us/financial-advisors/morrison-group/

Applications Accepted By: Brannon N. Brown, CFP®, APMA®, M.A.
BRANNON.N.BROWN@LPL.COM
Subject Line: Financial Planner

Job Description

ROLES AND RESPONSIBILITIES
We are looking for a full time Certified Financial Planner ® to assist our practice in providing world class financial planning, insurance, and investment services to our clients. This individual will build financial plans from the ground up for new clients, ensure current clients’ plans are always up to date and serve as a liaison between clients and advisors in matters related to financial planning and personal financial analysis.

QUALIFICATIONS AND EDUCATION REQUIREMENTS
Completion of a college-level degree in personal financial planning or a CFP® Board-accepted equivalent, including completion of a financial plan development (capstone) course registered with the CFP Board. For the right cultural fit, we are willing to consider a candidate who has passed their CFP® examination but has not yet fulfilled the full 6,000 hours of experience to receive the certification.

PREFERRED SKILLS
- Analytical and problem-solving skills: Ability to analyze the clients’ financial data and combine with deep knowledge of planning concepts and options to provide proper financial advice to clients.
- Exceptional communication and presentation skills
- Communications and interpersonal skills: Ability to network well with associates and manage relationships with clients.
- Organized and detail-oriented: Properly allocating the time necessary to manage each client’s financial plan and checking details to minimize the likelihood of error.
- Experience with E-Money Software preferred
- Proactive, Self-Starting, Fast Working
• Local in the Greater Denver, Colorado area
• 3-5 Years’ Experience Preferred
• Looking for a career in Financial Planning – not in being a Financial Advisor

ADDITIONAL NOTES
Salary depends on experience. Benefits include 2/3rd medical, dental, HSA and vision coverage. Potential flexibility for some working from home for the right candidate. 401(k) and match. Two weeks paid vacation in addition to all market holidays.

Reviewed By: Brannon N. Brown  Date: 05/21/21

Last Updated By: Brannon N. Brown  Date/Time: 05/21/21