Job Description

At Nelson, Van Denburg & Campbell, believe in the power of a strategic plan. As financial planners we create, implement, and monitor plans on a daily basis, but we also believe that each plan needs a purpose.

Creating a financial plan helps our clients see the big picture, set short- and long-term goals and really understand how to work toward those goals in manageable ways. Clients often tell us that planning is on their long ‘to-do’ list, but it gets pushed aside for family and career commitments. We want to bring peace of mind to their planning with our collaborative and highly trained financial planners.

Connect

We meet with our clients to introduce our team, planning process and investment philosophy as well as understand their specific goals and planning needs.

Assess

Our next meeting will take a closer look at the client’s financial trajectory and identify both the strengths and weaknesses in their current management.

Strategize

Now that we understand the client’s goals and financial situation, we’ll work together to create a thorough plan to maximize their strengths, shore up their vulnerabilities and help secure their financial future.

Manage

Once we’ve established a plan, we’ll closely monitor and manage its progress and then report back to the client on a regular basis.

POSITION SUMMARY:

We are seeking a Financial Planner who will be responsible for developing, monitoring and assisting with the implementation of specialized and 100% customized financial plans for our clients, focusing on:

* Investment planning
* Retirement planning
* Cashflow management
* Asset/Liability planning
* Education planning
* Income tax planning
* Survivorship/insurance planning
* Estate planning and coordination

KNOWLEDGE, EXPERIENCE AND SKILLS:

Must be able to demonstrate previous experience working with clients in developing, implementing and monitoring financial plans for clients, along with working with a team to provide the best duty, care and expertise possible for our clients

* 2-3 years’ experience with financial planning, investment management and client relationship management
* Experience with Financial Planning Software; ex. MoneyGuidePro, E-Money, etc.
* Professional interaction with clients, team members and third-party associates
* Building positive working relationships with employees at all levels within the organization
* Exercising sound judgment when making decisions
* Able to meet deadlines as necessary
* Effectively work with minimal supervision
* Excellent problem solving/creative thinking
* “Can-do” attitude, pro-active and resourceful
* Must possess exceptional verbal and written communication skills in working with firm Advisor’s and clients
* Must have knowledge of Microsoft Office software products, including Outlook and Word, but especially Excel
* Must have excellent organizational skills and the ability to effectively prioritize a variety of tasks for maximum impact
* Must be able to work in a team oriented, fast-paced environment and work under pressure

EDUCATION, CERTIFICATIONS AND LICENSES:

* Bachelor’s Degree required
* CERTIFIED FINANCIAL PLANNER™ designation required
* FINRA Securities Licenses preferred

Job Type: Full-time

Pay Structure: Salary