**Financial Planner/Wealth Associate**

The Wealth Associate role and duties will be based on the person and experience level but there is an expansive opportunity for the role and responsibilities.  We have an entrepreneurial growth mindset and want the entire team to participate in the firm’s future success.

* Provide financial planning support through the creation, analysis, recommendation and implementation of financial plans using planning software eMoney and other similar tools
* Attend client meetings in support of Senior Wealth Advisor to translate meetings into plans, actions and client deliverables
* Independently conduct data gathering calls with clients to obtain information required to develop or update the financial plan
* Collaboratively work with Senior Wealth Advisor as needed
* Provide support at times for trading, rebalancing and investment research
* Targeting a candidate that is a CFP or motivated to progress towards a CFP

Basic Qualifications:

* Passionate about partnering with clients, continuous improvement and teamwork
* 0-5 years of similar or relevant work experience
* Bachelor’s degree
* Excellent verbal, interpersonal and written communication skills
* Proficiency with Microsoft Office software suite
* Location: Dallas, TX

If you are interested in this position, please email your resume to: [harris@planningstrategies.net](mailto:harris@planningstrategies.net)