

Arbor Wealth is looking to expand our team by adding a financial planner & client service associate. We are growing and want to develop new teammates to grow with us.

To be successful at Arbor Wealth Management, our team members must be highly motivated, detail-oriented, have a passion for financial planning and client service, be dedicated to personal growth and open to change, be able to prioritize multiple projects, and enjoy working and communicating as a member of a team.

**Responsibilities include:**

\*Gathering, organizing, and entering client data into multiple software programs

\*Tax return reviews under the supervision of a senior CPA/CFP

\*Attend client meetings and take notes

\*Assisting with needed paperwork/forms/etc.

\*Researching ad hoc topics

\*Batch processing client-wide activities - RMDs, tax letter, etc.

\*Contributing as a team player -be proactive and take initiative

\*Other tasks as directed

We build personal relationships with our clients and assist them in making smart decisions about their lives. We are looking for colleagues who have a passion for financial planning and truly helping families improve their lives. We have a number of Certified Financial Planner™ practitioners on staff. We believe in the professional development of our staff and have designed a formalized career path for the successful candidate to follow.

**Benefits Package:**

\*Compensation: $50K annually with traditional but non-guaranteed annual bonus compensation

\*401(k) with mandatory employer profit-sharing contribution

\*Defined Benefit Plan with 100% employer contribution

\*Incentive compensation program

\*Health & Dental insurance package

\*Paid leave

**Requirements:**

\*A bachelor's degree with a focus/specialization in tax/accounting/financial planning

\*Excellent written and verbal skills

\*Strong experience with Excel, Outlook, and ability to learn new software easily

\*An open mind to learning and the ability to share from your own unique viewpoint

\*A spirit of client service

If interested in this position, send your resumes to Andrew McDowell: [andrewmcdowell@arborwealth.net](mailto:andrewmcdowell@arborwealth.net)