**Financial Planner – Early Career – Albuquerque, NM**

**Retirement Extender®**

**Steve Margulin CPA/PFS CFP®**

**7301 Jefferson Street Northeast, Albuquerque, New Mexico 87109, United States**

**Barbara@RetirementExtender.com**

Steve Margulin founded the firm in 1993 and uses a tax-focused approach to the work we do.

Our expertise is in tax efficiency both in investing and in distribution planning. We follow the life planning school of thought and implement a holistic approach in our guiding of clients.

**About Retirement Extender**

Retirement Extender® is a wealth management firm working with an upper middle income and semi-affluent clientele. We practice as a fiduciary and do no commission work. We use an AUM model for our revenue.

We also use a team-based approach. Some team members focus on the income tax aspects, others on the portfolio construction and others on the financial planning. Their work all comes together for the benefit of the client family at a client review.

Our team consists of 7 full time and 2 part time employees, and we serve about 170 families. We are a partner firm of CWM LLC (Carson Wealth Management).

**Job Description**

We are looking for someone to learn all aspects of our work before focusing on a smaller sub-set. You would start as a floater--preparing financial plans, learning to create the forms, and processing transactions. You would also work in the tax department for our other group in the spring. Ultimately you would grow into a Wealth Advisor position.

You will work internally with a team of advisors to identify planning issues and opportunities, analyze strategic options, generate exhibits and statements, advise clients, and manage implementation of client decisions in conjunction with the Wealth Advisor. Externally, you will partner with leading investment, tax, and legal firms to deliver a customized plan tailored to meet each client’s unique objectives.

There is not a sales component to this position. You will be required to take the Series 65 or obtain the CFP® certificate. The beginning salary for this position is $42,000-$48,000. There are also discretionary bonuses.

**Job Requirements**

* Financial Planning Undergraduate Degree in coursework to qualify to sit for the CFP® exam
* Knowledge of Financial Advisor office tools (i.e., Salesforce, etc.) preferred
* Strong knowledge of Microsoft Office, including Word, Excel and Outlook
* Computer literacy to easily learn new programs
* A genuine interest in the financial services industry
* Desire to provide the highest quality of service
* Strong attention to details
* Planning and organizational skills
* Manage multiple projects with precision
* Exceptional written and verbal communication skills
* Background check required

**Here, you'll enjoy:**

* clear career path—approximately four years from entry to Wealth Advisor
* base salary and bonus potential
* solid benefits including health insurance
* Simple IRA Retirement Plan with employer match
* ongoing access to training and opportunity for professional growth
* moving allowance will be discussed
* casual Friday
* work from home

**Who thrives here?**

We are in Albuquerque, New Mexico, home of the Albuquerque International Balloon Fiesta (880,000 visitors each year and over 500 balloons). We have glorious sunshine ~310 days per year, low humidity, and four distinct seasons. We enjoy active lifestyles and outdoor recreation such as hiking, biking, camping, skiing and much more! Home prices and cost of living are below the national average, and average commute time is just 21 minutes.

We have documented processes and procedures to refer to, and helpful and supportive team members. As a firm, we are better organized than most. For more information about our company, please visit our website [www.retirementextender.com](http://www.retirementextender.com)*.*

We are an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status or any other characteristic protected by law.

Be part of our story today!

Tax services are offered separately through a Certified Public Accountant and other tax professionals at Steven P. Margulin CPA, PC. Steven P. Margulin CPA, PC is not affiliated with CWM, LLC.

To apply, send a letter of interest and a resume to Barbara@RetirementExtender.com