**Financial Planning Analyst**

**Position Summary**

If you’re a looking to make a difference in people’s lives, working as a Financial Planning Analyst at Capstone Financial Advisors might be right for you.

We are a fee-only, independent Registered Investment Advisor (RIA) giving high-net-worth clients comprehensive wealth service tailored to their unique circumstances. We are also 100% employee owned. Each member of our team is personally vested in making sure our clients receive best-in-class service.

Capstone is actively growing in ways that allow us to maintain our personalized service. It’s not just about getting bigger. It’s about getting better.

When you’re at Capstone, you’ll experience the professional and personal growth that comes with an honest and transparent financial-services environment.

At the core of Capstone’s client service structure is our **Service Teams**, consisting of Wealth Advisors, Financial Planners, Financial Planning Analysts, and Client Service Specialists.

As a member of the Service Team, the **Financial Planning Analyst** will support Wealth Advisors' implementation of client' customized financial plans. The Financial Planning Analyst will also work with members of the firm's Tax and Portfolio Trading teams.

**Duties & Responsibilities**

**•** Assist in client meeting preparation, including updating client balance sheets and income tax projections and running portfolio performance reports

• Support the implementation of client financial plans by completing post-client meeting action items

• Assist in the preparation of client tax returns

• Assist with client portfolio onboarding and rebalancing

• Gather, maintain, and facilitate client data between various financial planning applications

• Assist with the firm’s client billing process

• Execute client account service tasks, such, as opening/closing accounts, transferring funds between accounts, and processing deposit/withdrawal requests

• Support firm-wide projects and initiatives to enhance client deliverables and firm processes

**Qualifications**

**•** Bachelor’s degree from an accredited college or university in financial planning, accounting, or finance

• Up to three years of relevant experience

• CFP® designation or desire to obtain

• Extremely strong time-management skills

• Must be able to multi-task, problem solve, and manage competing deadlines

• Utilize good judgment in executing job responsibilities

• Exhibit the highest levels of confidentiality and discretion with clients and their financial matters

• Thrive in a fast-paced environment

• Highly detail oriented, accurate, and organized

• Strong interest and ability in fostering internal and external relationships

• Excellent written and verbal communication skills

• High integrity, positive attitude, and strong team orientation

**Salary & Benefits**

• Competitive salary

• Bonus

• 401(k) plan with company contribution

• Medical, vision, and dental insurance

• Flexible spending account

• Short- and long-term disability insurance

• Life insurance

• On-site, health club membership

• Paid Time Off

• Reimbursement for relevant professional membership fees and professional continuing education costs

**Recent Capstone Accolades**

• 2021 Best Places to Work for Financial Advisors by Investment News

• 2021 Best Places to Work in Illinois

• 2020 Financial Times 300 Top RIAs

• 2020 Financial Advisor Magazine RIA Ranking

For more information and to apply, please contact Bill Murphy, MBA, SHRM-CP ([bill.murphy@capstone-advisors.com](mailto:bill.murphy@capstone-advisors.com)) with a resume or CV.

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