Financial Planning Analyst- Goodman Financial Corporation, Houston TX

Description

Goodman Financial Corporation is excited to add a Financial Planning Analyst to its Financial Advisory Team, an opportunity driven by multiple internal promotions. The Financial Planning Analyst is an integral member of the Client Service Team committed to delivering an exceptional client experience.

Goodman Financial is an Equal Opportunity Employer and supports diversity in the workplace. We offer competitive salary and benefits including a 401(k), PTO, and insurance coverage (medical, dental, vision, short-term disability). A background and resume check will be performed prior to employment.

Why Goodman Financial Corporation?

Goodman Financial Corporation is an SEC-registered RIA firm providing personalized investment management and financial advisory services primarily to individuals, but also institutions such as endowments and foundations. The company is located in the Galleria area and has been serving clients since 1989. We have been a fee-only firm since inception. No product sales. No dual-registration. The firm is committed to always doing what is right, not just in putting our clients' interests ahead of our own, but also in how we value our employees and serve our community. While we are not a CPA firm, almost half of our team members are CPAs and we all share that CPA work ethic and commitment to integrity, unbiased thorough analysis, and attention to detail. We actively encourage and expect intellectual curiosity and a growth mindset from each of our team members, and we offer financial support for their professional growth. We hold all team members accountable to our clients, other team members, the firm, and to themselves. We believe that by embracing accountability in all aspects of what we do, we can achieve the ambitious goals set by and for the firm and for each team member. We humbly accept the trust our clients place in us by allowing us to manage their life savings, and we do not take that responsibility lightly. We are seeking a like-minded, qualified, and dedicated individual to join our team.

Essential Responsibilities

- Partner with Senior Financial Advisors and Associate Advisors to provide an exceptional client experience.
- Input client data into Financial Planning software to obtain a holistic view of a client's situation.
- Conduct financial analysis and support Advisors in tailoring financial planning, investment, and tax strategies for existing and prospective clients.
- Prepare investment plans and presentations for prospective clients and assist in client onboarding process.
- Assist Client Service Teams with preparation for client meetings and creation of financial plans.
- Take the lead in client meeting preparation, including developing client PowerPoint Presentations to address unique client goals, needs, and concerns.
- Enter post-meeting client notes, follow-up on action items, and ensure items are completed in a timely, high-quality manner.
- Assist Client Service Teams with preparation and review of client paperwork.
- Assist with and manage strategic projects to support the firm's continued growth.
- Prepare PowerPoint Presentations for team members' Public Speaking Engagements.
- Draft content for GFC's newsletter, client Financial Advisory Update emails, industry publications, and Social Media platforms.

Qualifications

- Bachelor's or Master's Degree earned by May 2021, preferably with an emphasis in financial planning, finance, accounting, or business
- Desire to earn CFP® designation preferred
- Growth mindset
- Confident and professional
- Excellent communication skills; Strong interpersonal skills
- Adaptability; High degree of comfort with technology changes
- Attention to detail and high degree of accuracy
- Proficient using Microsoft Excel, Word, and PowerPoint
- Experience with a financial advisory or investment firm (or CPA firm providing financial advisory services) a plus
- Prior experience with financial planning software, a Salesforce-based CRM system, and Black Diamond (BD3) a plus
- Prior experience with TD Ameritrade institutional and Charles Schwab institutional platforms a plus

Compensation Package

Compensation package is negotiable, commensurate with experience.

To apply, please submit your resume to employment@goodmanfinancial.com with a cover letter that includes a short paragraph about why you would value this role. In your email, please include in the subject line "Financial Planning Analyst" and your first and last name.

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About Goodman Financial Corporation
Goodman Financial Corporation is a Texas-owned, fee-only investment management and financial advisory firm that has no affiliation with any insurance company, bank, mutual fund or brokerage firm. Our independent model and high ethical standards keep us focused on keeping our clients' goals as our top priority in all the investment decisions that we make. We actively manage individual stocks and bonds in customized investment portfolios which provides greater flexibility, tax-efficiency, and lower expenses to our clients. Our investment management clients also receive comprehensive financial planning, covering applicable areas relevant to each client, with particular focus on tax efficiency in portfolio structure, accumulation, and distribution. Additionally, risk management plays a key part in both the financial advisory and investment decisions that we make. As an additional safeguard to our clients, investment assets are held by insured, third-party custodians.