Financial Planning Associate Job Description

Our mission at Aspen Wealth Management is to remove the anxiety and worry from our clients onto ourselves, through education and open dialogue. We strive to provide financial clarity for our clients, conducting ourselves with honesty and integrity, all with unmatched service.

Description

The Financial Planning Associate is responsible for the analysis, creation, and maintenance of the Comprehensive Financial Plans for the firm's clients. This individual focuses on client needs in the areas of cash flow, retirement planning, estate planning, education planning, and major purchase planning. The purpose of this position is to build your technical competency.

Responsibilities & Activities

- Provide positive and professional service to the client base with a focus on building long-lasting relationships.
- Assist in communication with the client base including phone calls, emails, and meetings.
- Attend client meetings as requested, take notes, enter notes into system and update client profiles as needed.
- Responsible for all follow-up activities post client meetings.
- Develop a close, long-term relationship with wealth planning clients to understand their current circumstances and future needs or wishes.
- Set up clients on Planning Software and assist in aggregating their accounts into the system.
- Enter client information into Planning Software, analyze, and generate wealth plans.
- Prepare client deliverables for all plan presentations and review meetings.
- Continually looks for ways to improve the wealth planning process.
- Assist other Advisors as requested.
- Performs other duties as assigned.
- Develop and maintain written systems of all activities.
- Attend all firm client events.

Educational & Industry Requirements

- CFP® designation must be attained.

Knowledge, Skills, & Abilities

- Extreme attention to detail.
- Strong analytical, interpersonal and communication skills.
- Excellent attitude and an extraordinary client service orientation.
- A genuine interest in serving and caring for other people.
- Excellent organizational and time management skills.
- A desire to succeed.
- An ability to handle multiple tasks and handle stress.
- Attendance is an essential function.
- Salary is commensurate with experience.

Please send resume to: john@aspenwealthmgmt.com