

**Blake | Cooper Financial Strategies**

**2001 Broadway**

**Lubbock, TX 79410**

**806-744-5511**

**Financial Planning and Client Experience Associate**

We are an independent, financial advisory firm affiliated with Raymond James. We are in Lubbock, TX and are seeking a financial planning and client experience associate to join our firm. We work in a vertical team to assist our clients with all aspects of their financial needs.

Our firm provides comprehensive, holistic financial planning and investment management services for individuals and families. In addition, our firm has a specialty in divorce planning. While most of our clients are engaged in our financial planning process and investment management services, we also provide financial planning during the divorce process and assist in the outcome of the final disposition of assets both for individuals going through a litigated divorce and in the collaborative divorce process. We work with clients in two different arrangements:

* Financial management (AUM Model) – ongoing asset management, comprehensive financial planning, and advice year round
* Hourly Advice and Comprehensive Financial Plans (Hourly fee model) – financial consultation and customized financial plans that clients implement themselves as well as divorce planning for clients.

**Position Overview**

This is a professional position that will assist in the creation of complex and comprehensive financial planning recommendations, assist in client reviews, participate in asset management for clients and assist with client service. You will be involved in the entire client engagement and will have opportunities for professional growth. To be successful, you must have the ability to utilize critical thinking skills, work independently, anticipate firm needs and client question as well as work within a team.

Responsibilities

* Collect, organize, and synthesize personal and financial client information
* Analyze clients financial planning needs
* Act as a concierge for clients to help them execute important tasks
* Create deliverables for meetings and other engagements
* Continuously monitor clients’ financial situations with detail and accuracy
* Be available to field ad hoc planning questions from clients
* Conduct research projects for the company and its clients
* Participate in company meetings and help influence company – wide decisions
* Improve firm operations by creating and completing internal projects
* Participate in client meetings

Qualifications

* Strong interpersonal skills
* Strong logical mind
* Organized with attention to detail
* Passion for helping others

Benefits

* Competitive salary with bonus structure
* 401 (K) with employer matching
* Health insurance
* Continuing Education – paid professional dues, conference attendance and training
* Team environment
* Significant career growth opportunity

Please e-mail resume to: [sblake@blakecooperfinancial.com](mailto:sblake@blakecooperfinancial.com)