FINANCIAL PLANNING SPECIALIST

Ideal Candidate – Who You Are:

- Are you driven and determined to build a career in financial planning?
- Are you interested in retirement planning, cash flow analysis, tax and insurance strategies, and helping others achieve their financial goals?
- Are you excited by the prospect of providing financial planning analysis to a group of advisors? Does your mind race with how to do things more consistently, with scalability, excellence, and efficiency?
- Are you looking to grow with an innovative financial planning team and join an independent, employee-owned, and nationally recognized RIA firm?

BSW Wealth Partners – Who We Are:
BSW is a multi-family office and wealth advisory firm managing $1.5 billion for a national and international clientele from offices in Boulder and Denver. Our purpose is to Make Life Better. BSW has been named a Best Place to Work by Outside Magazine, Investment News, and the Denver Business Journal; one of the top 300 Financial Advisers by the Financial Times; is Gender Equity Now certified; a Certified B Corporation; and a Public Benefit Corporation (PBC).

Your Dream Position – Position Description:
BSW Financial Planning Specialists serve as in-house experts and provide analytical and quantitative support to BSW's Advisory Group. Financial Planning Specialists work closely with BSW Advisors in a non-client facing capacity. This position is intended to stay non-client facing, and there will be ample opportunity for growth alongside the expansion of the Financial Planning department. Financial Planning Specialists will have the opportunity to broaden their responsibilities, knowledge, and potentially become a subject matter expert in one or more areas of the planning profession, or transition to an Advisory track if there is a current need in the Advisory Group.

Responsibilities:

1) **Provide ongoing financial planning support to BSW's Advisory Group both during onboarding new clients and for existing clients.**
   During onboarding new clients
   - Add data to financial planning software, conduct financial sustainability analysis, create investment policy proposals

   For existing clients
   - Manage net worth, cash flow, tax, and insurance data
   - Create or update financial plans using financial planning software while considering client goals and objectives, assets and liabilities, cash flow needs, and tax considerations
   - Provide various analyses such as Social Security and pension payout assessments
   - Collaborate with the advisor and/or external experts to perform property and casualty insurance, life insurance, annuity, and estate planning reviews
   - Provide expertise and support in all areas of client checklists, i.e., education planning, charitable giving, tax planning, executive compensation
   - Research various financial planning topics

2) **Serve as an expert in financial planning topics as well as tools and software used by BSW's Advisory Group.**
   - Stay current on planning recommendations, laws, and regulations
   - Support BSW's Advisory Group in navigating one-off questions as well as changes to planning recommendations or laws and regulations.
   - Provide technical expertise in eMoney, PreciseFP, and Adobe InDesign as well as new tools added to the technology stack of BSW's Advisory Group.

3) **Support BSW's Financial Planning department with various initiatives.**
   - Recurring financial planning tasks, i.e., eMoney data maintenance, beneficiary RMD calculation
   - Contribute to blog posts on financial planning topics in collaboration with other members of BSW's Financial Planning department and/or Advisory Group.
   - Contribute to annual projects and goals as defined by BSW's Advisory Group or Financial Planning department.

Qualifications – The Right Stuff:

- Passion for financial planning and a desire for a long-term career path
- Preference to work on the analytical and systems side of the business vs. client facing
- CFP or certification in process
- Undergraduate or advanced degree
- Financial planning experience with an RIA or in a financial advisory setting (1-5 years)
- Experience with financial planning software, preferably eMoney
- Strong technology skills, strong command of Microsoft Office Suite, especially Excel
- Experience with CRM
- Strong analytical and critical thinking
- Attention to detail, self-motivated, well organized
- Process orientation
- Strong interpersonal communication
- Outstanding integrity and discretion
- Goal-oriented team player
- Lifelong learner

Perks – Why We're A Perennial Best Place To Work:

- Winter & Summer Fun Days
- Profit Sharing, 401(k) Plan + Matching
- Health Savings Account + BSW-funded Healthcare
- Paid Maternity & Paternity Leave
- BSW pays for obtaining and maintaining professional certifications
- PTO Days for Volunteering
- Healthy Lifestyle & Custom Workspace

B-Corp Status, Diversity & Inclusivity – Another Reason You Will Be Proud to Work at BSW:
BSW Wealth Partners is a proud to be both a Public Benefit Corporation (PBC) and a Certified B Corporation. Certified B Corporations are for-profit companies seeking a better way to do business by meeting the highest standards of third party-verified social and environmental performance, accountability, and transparency. B Corp certification is part of a global movement that serves to redefine success in business so that companies aspire not only to be the best in the world, but best for the world. BSW's certification highlights our commitment to diversity, equity, inclusion, and gender equity. **BSW is a company based on merit and excellence that welcome all races genders, and sexual orientations.**

We encourage applications from all qualified candidates, including:

- Traditionally under-represented populations within financial services.
- Parents returning to the workforce after extended career breaks.
- People with physical disabilities or limitations.
- Transitioning military service members and veterans.

Application Process:
Submit your CV/résumé and a cover letter to nmurphey@bsw.com . In your cover letter, please address the following:

- *In your own words (20 or less), describe what you think BSW does.*
- *What are the top three reasons you are the best candidate for this position and for BSW?*
- *What elements of working in a non-client facing capacity motivate you? Are you interested in doing so for the long-term?*
- *Why are you interested in our firm and this industry? What aspects? Do you have any applicable professional experience?*