Associate Planner

About Us

Grace Lane Financial Partners is an Austin based financial planning and investment management firm designed to help individuals and families make space for the things in life that really move them. At Grace Lane, we welcome clients to a new way of looking at money; one that will help maximize their life experiences so they can live their best life now and in the future.

Position Overview:

Grace Lane is seeking an Associate Planner. The Associate Planner works in a supporting role to prepare financial plans, coordinate the planning process, and provide support to clients in executing their plans.

Summary of Essential Duties & Responsibilities:

The Associate Planner will participate in all aspects of the financial planning process. The successful candidate will participate in client meetings along with a Client Lead, develop strategies unique to each client using critical thinking and in-depth analysis, and be responsible for client meeting preparation.
Qualifications & Requirements:

- Bachelor’s degree in accounting, financial planning, or finance required. Master’s degree a plus.
- CPA/PFS (Certified Public Accountant with Personal Financial Planning specialization), CFP (Certified Financial Planner), or CFA (Chartered Financial Analyst) charterholder or progress towards one of these designations.
- Strong attention to detail and ability to work independently and in a team setting.
- Excellent verbal and written communication skills.
- Proficiency with cloud-based applications including CRM (such as Salesforce), virtual meeting applications (such as Zoom and Teams), and personal financial planning tools (such as eMoney and RightCapital).

Competitive salary and benefits based on skills and experience. For more about Grace Lane, see our website at GraceLanePartners.com.

To Apply:

Submit your resume to:

Guy Draper, CPA/PFS, email: guy@gracelanepartners.com
Greg Rychlik, CRPC, CASL, email: greg@gracelanepartners.com