Texas Tech Financial Planning Graduate for Apprenticeship Program / Full-Time / Financial Planning & Investment Firm

Job Summary

Financial planning firm seeking a graduate of the Financial Planning department, preferably with a Master's Degree. Full-time (8-5, Monday - Wednesday and Friday 8-4). Located in downtown Fort Worth, TX; Upper-West Side

Salary and Benefits
W2 Employee
$36k – $46k
Opportunity for advancement
Three year apprenticeship path from Para-planner to Junior Advisor to Senior Advisor

Responsibilities and Duties
- Open and close office
- Process in/outbound mail and answer phones
- Prepare account paperwork accurately (new account, distribution/contribution requests, etc.) and follow up with clients and sponsor companies as needed
- Prepare for client meetings and reviews, including the preparation of reports, proposals and financial illustrations.
- Take thorough notes during new client meetings
- Use eMoney to enter client data, create scenarios and reports
- Complete client assumptions, asset recommendations and plan recommendation documents
- Maintain effective working relationships with clients by assisting with their requests and account actions to completion
- Maintain client records, CRM database, and compliance files
- Interface with team members, custodians, and insurance companies
- Other assignments, as needed

Qualifications and Skills
- Bachelor's degree from the Texas Tech Financial Planning department, Master's degree a plus
- Proficient in Microsoft Office & Windows (Word, Excel, Outlook) and with Adobe Acrobat
- Strong attention to detail with the ability to work independently while embracing team collaboration
- Highly organized
- Displays exemplary professional communication skills, verbal and written
- Must be professional, courteous, and dependable
- Excellent client service skills
- Ability to manage multiple projects at once with consistent follow-through Commitment to provide high-quality work both to internal and external partners
- Ability to meet deadlines
- Minimum 3 professional references required
- Process driven and results oriented
- Ability to work well in a fast-paced environment
- Background check required
- Ability to work legally in the United States

Interview Process – (Please note, we will not ask you for any personal information during the interview process)
1. Send your resume & cover letter to careers@strittmatterwealth.com
2. Phone Interview #1
3. Phone Interview #2
4. In person interview with CEO, Josh Strittmatter

About Us

Strittmatter Wealth Management Group, LLC was established in 2007. We are located in downtown Fort Worth and work with high net worth clients to provide financial planning and investment management.

Seniority level - Mid-level
Employment type - Full-time
Job function – Administrative financial planning
Industries: Financial Planning, Financial Services, Investment Management, Accounting

STRITTMATTER
WEALTH MANAGEMENT GROUP, LLC

Jump-Start Your CFP Career with the Apprenticeship Track at Strittmatter Wealth

Vision: Here at Strittmatter Wealth Management Group, we sleep well at night knowing that our fee-based planning philosophy provides our clients with holistic, personalized, and transparent advice that always revolves around their goals and needs. We redefine what client service is by treating each and every client with support, respect, and our famous hospitality that creates a warm and inviting atmosphere. Through the apprenticeship track, you will be able to witness the Strittmatter difference firsthand through close mentorship and a breadth of hands-on experience.

About: Are you looking for a wealth management company that serves as a fiduciary to clients and has tremendous growth opportunity? We are a Registered Investment Advisory (RIA) firm that offers everything you should be looking for in your first career. Our focus is full comprehensive financial planning for our clients, including investment management. You will have the ability to quickly move up the ladder as you gain experience in all aspects of the business. We offer personalized training with written resources for reference and autonomy to quicken your learning phase. Our unique apprenticeship track provides you with tremendous opportunity that most firms don't.

CFP
CERTIFIED FINANCIAL PLANNER

Program:

Year 1: Learn the ropes of the business from the basics of running the office, to the systems and documents required in operations, to conducting analysis and preparing financial plans as you navigate your way up the ladder as a Customer Service Specialist, Paraplanner, and Advisor. Receive one-on-one mentorship from the lead advisors who are Certified Financial Planners.

Year 2: Continue to hone your financial planning and analysis expertise as a Paraplanner and begin assisting in client meetings as a Junior Financial Planner.

Year 3: Advance your abilities in client meetings to move from a Junior Financial Planner to a Senior Financial Planner, allowing the ability to conduct client meetings independently.

Requirements: Ideal candidates will hold a bachelor's degree at a minimum, preferably from a financial planning program. Internship experience is a plus and a positive attitude, team-oriented mindset, and exceptional client service are all musts. Assuming appropriate education requirements are met, the apprentice will sit for the CFP exam. Upon gaining the Certified Financial Planner certificate, the Series 65 exam will not be necessary since the credential is recognized as sufficient experience and knowledge to provide investment advice. When the exam is passed, the firm will reimburse the cost of the fee and any study materials.

Mission: SWMG's mission is to enrich, educate, and advance our clients' lives while helping them to feel confident about their future and to create multi-generational wealth through education, planning, and sound advice.

Your Personal Financial Wealth Team

Strategic Partners Working for You

SWMG

Perks:

- Matching 401(k) contributions
- Paid time off
- Health benefits
- Mentorship from CFP professionals
- Located in the beautiful downtown Fort Worth area
- Ongoing training to help you every step of the way
- Reimbursement of CFP examination fee upon passing score
- Education track
- Structured career path

Join: Get started today by calling or emailing us with any questions or for more information on the apprenticeship track. When you're ready to apply, email us with your cover letter, resume, and a list of at least three references.

CONTACT US

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