



# IRONCLAD

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## S T R A T E G I E S

### **Job Description – Planning Associate**

#### **JOB SUMMARY**

This individual interacts with clients on a daily basis to:

- 1) gather & analyze information,
- 2) develop recommendations,
- 3) implement recommendations and
- 4) monitor the financial plans of their clients.

The Planner collaborates with one or more Consultants or Advisors in the firm or affiliated companies to deliver expert, comprehensive advice to their clients on both financial matters and personal, estate and business related planning

#### **JOB DUTIES**

- Participates and conducts client meetings
- Prepares the Financial Planning recommendations using firm Software, Spreadsheets and Presentation materials
- Prepares the Planning recommendations using firm Software, Spreadsheets and Presentation materials (and work product from other advisors/consultants)
- Collaborates with members from each of the firms business lines to best serve the client
- Implements Financial Planning recommendations
- Monitors the Financial Plan and communicates with clients
- Updates Financial Planning recommendations
- Manage overlapping tasks between department areas
- All other duties as assigned

#### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Bachelors Degree
- Educational Background preferred (Financial Planning, Finance, Law, Accounting or Business Administration)
- Pass internal exams - Profiles/Dashboards including:
  - Life Insurance General Lines (within 120 days)
  - Series 65 (or equivalent) attained within 120 days

**For consideration please forward a resume to [info@ironcladstrategies.com](mailto:info@ironcladstrategies.com)**