



DENNIS STAVINOHA, INC.
Your Vision. Your Plan. Your Wealth.

We are a wealth management firm located in Northwest Houston seeking a Wealth Plan Specialist to join our team and to help make a positive difference in the lives of our clients. We handle the financial matters for a select group of families and business owners.

Wealth Plan Specialist

Responsibilities

- Generate and maintain wealth plans
- Create presentations summarizing the wealth plans for client meetings
- Coordinate completion of meeting action items with clients and clients' advisors
- Interact and correspond with clients on documentation
- Provide updates on the status of the wealth planning process
- Perform investment and product research
- Design/obtain case illustrations for life, long term care and disability insurance and coordinate application and underwriting process
- Open and process account requests
- Prioritize and deliver on most critical issues or activities on a daily basis
- Create, maintain and enhance written office systems and procedures

Qualifications

- Bachelor's degree with minimum of three years of financial industry experience
- CFP®
- Experience with financial planning software eMoney
- Basic understanding of comprehensive financial planning, including retirement, insurance, investments, estate planning and income tax
- Detail-oriented, accurate, organized and able to set priorities in managing projects
- Ability to handle multiple tasks and impeccable follow through
- Excellent attitude and a genuine interest in serving and caring for people
- Ability to thrive in a collaborative, small-office environment
- Strong proficiency with Microsoft Excel and Word

Interested applicants can send their resumes with a cover letter via email to dennis@dennisstavinoha. Dennis Stavinoha, Inc. is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. No phone calls or direct mail, please. No third parties.