

We are beginning our search for our next candidate in our three-year Financial Planning Residency Program. The next residency position will begin July 2019. We seek someone who feels a calling to become an integrated financial planner who wants to grow and learn the necessary skills to succeed. The Financial Planning Resident will leave our firm with the experience needed to join an established firm. The resident will acquire all the skills expected of other KFG associates.

The primary skill we seek for this position is the felt sense of being called to the financial planning profession, the technical knowledge and curiosity needed to develop financial plans, a keen interest in relational skills, and a commitment self-development. We have a team approach to financial planning, so all employees work with the same clients.

We are a growing 35-year-old, fee-only integrated financial planning firm. We offer an unique team-oriented culture that offers a high level of freedom and responsibility. We have a reputation for excellence, established clients and the experience to help you reach your personal and career goals. Our company has 100 clients located throughout the US. Our founder, Rick Kahler, is a noted speaker, author, and columnist on financial planning and financial therapy.

Our employees are as important as our clients, and we work to provide both with a collaborative atmosphere and learning environment. We value our employees and we take pride in recognizing and supporting their outstanding talents and efforts. We empower our employees through a unique governance structure (Holacracy) where each person has responsibility and control over decisions as they relate to the role they play within our company. We commit ourselves to the delivery of a superior quality of services based on a foundation of honesty, integrity and ethical treatment.

The core purpose of our company is to transform the financial and emotional well-being of people. This includes our clients and ourselves.

Our core values are authenticity, unbiased advocacy, well-being, and continuous improvement. We put our values into action by:

- Putting clients' first
- Guiding people to reach a destination in an unfamiliar area
- Giving sound advice and creative solutions
- Constantly educating ourselves
- Personally practicing what we preach
- Taking clients only where we have gone ourselves
- Being serial innovators
- Taking personal responsibility for our actions and contributions

Responsibilities:

- Work with clients in a technical, financial planning role
- Demonstrate good social, communication and non-verbal listening skills
- Developing meeting agendas, financial plans, and investment policy statements
- Work collaboratively with team members in an ensemble practice
- Confidently deliver advice to clients via conference call or face-to-face meetings
- Learn to facilitate the resolution of financial behavioral problems

- Structure advice and counseling around the big strategic financial picture
- Prepare, coordinate and follow through on any needed communication clients
- Maintain high ethical standards, confidentiality and professionalism at all times

Qualifications:

- Able to analyze data and advanced Excel skills
- Good intuitive thinking skills, practical, logical
- Ability to research and find answers for yourself
- Ability to get things done
- Strong conceptual skills, able to see the big picture
- Confident working with successful, high net worth clients
- Strong interpersonal skills, passionate about financial coaching and counseling
- Ability to think critically, identify and find solutions to client's need
- Drawn to a Holacracy, a non-hierarchical organizational operating system
- Embraces Non-Violent Communication, GTD, and self-development
- An ability to quickly grasp and discuss complex planning issues
- Has CFP® designation or a BA or MS in financial planning

No phone calls please. If interested, please send resume and cover letter to careers@kahlerfinancial.com.

In your cover letter please tell us:

1. Why do you want to live in Rapid City, SD for at least 24 months?
2. What attracts you to Kahler Financial Group?
3. The core purpose of our company is to transform the financial and emotional well-being of people. What does that mean?
4. What will you bring to Kahler Financial Group?
5. What do you need most from Kahler Financial Group?
6. What does "Financial planning from the inside out" mean to you in your life?

We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check and may be asked to complete personality and/or competency tests.