

## Employment Opportunity

Job Title: Financial Planning Associate

Mindful Asset Planning ([www.mindfulplanning.com](http://www.mindfulplanning.com)), located in Apple Valley, MN (since 1988), is a comprehensive fee-only financial planning firm with a team of advisors and financial planners.

Primary Function: Prepare/assist with plan preparation and presentation to clients; financial projections and analysis, goal summaries/progress/completion of tasks, communication and advising clients. Other potential functions are Firm marketing, new business development, or Firm finance.

Knowledge/Skills/Abilities: Proficiency with software tools such as CRM, financial plans, portfolio analysis, Word, Excel and Outlook, accounting and tax tools. Demonstrate written and verbal skills and effective communication to clients and staff. Focused and dedicated task management and goal achievement. Understand the principles and methodology of comprehensive financial planning and awareness of the psychology and emotions around financial habits and decision-making.

Requirements: High integrity and passion to make a difference in clients' lives, strong work ethic and dedication to high quality outcomes, detail oriented and self-motivated, embrace challenging and dynamic work environment, interact professionally and positively in a team environment.

Compensation: Relative to experience and education

Other: Interest in assuming greater responsibility over time and eventual Firm management or ownership.

Express your interest and background to Mark Brice by email, phone or mail at:

**Mindful Asset Planning, RIA**

14530 Pennock Ave, Apple Valley, MN 55124

952-432-4666

[mark@mindfulplanning.com](mailto:mark@mindfulplanning.com)

*Helping you MAP a more prosperous future*

