

## **Financial Analyst – Dallas-Fort Worth**

We are looking for someone special to join our team in Dallas-Fort Worth. Someone who loves solving problems, has an aptitude in math or finance, and thrives working in a team environment. Most importantly, we are looking for someone who loves using their intellect and talent to help others.

We work differently than most of the companies you'll come across. We are a mission-driven firm, focused on bringing positive change to financial planning and wealth management. We are a growing company, with growth-oriented individuals who work closely as a team and dedicate themselves to our shared values. You will have the opportunity to make an impact immediately.

If you're serious about this position, please check out more about our Help First philosophy.

This is a full-time, salaried position located in the Dallas-Fort Worth metro.

### **The right fit for the role**

As an analyst you will be building financial plans in our eMoney software, interacting directly with clients, and providing strategic and analytic support to the advisory team. You will be spending time in meetings and planning for investments. We want to grow and develop analysts to become advisors. You should be wired to ask tough questions and look at alternative solutions to complicated problems. You should be someone that likes to sit down and dig into a project or plan and then look forward to spending time with the client.

If you're energized and excited about everything you've read, please apply! If you aren't, that probably means this isn't the place for you—that's okay too.

### **Education and Experience**

1. Working knowledge of Microsoft products such as Excel, Word, PowerPoint, and Outlook.
2. Excellent communication skills, both written and verbal.
3. Able to work with, and maintain, a high level of confidentiality.
4. Interested in pursuing your CFP or Series 65.
5. Strong organizational and multitasking skills.
6. Finance internship and/or background preferred.

### **How to Apply**

- Write a cover letter (attached as a PDF) introducing yourself explaining why this position interests you and why you would be a great fit. Cover letters are meant to sell, so sell us!
- At the end of your cover letter, answer the following questions:
  - What is your secret to great customer support?
  - How do you define a great team and what is your personal vision?
- Also attach your resume (PDF).
- Send to [dana@paintedporchadvisors.com](mailto:dana@paintedporchadvisors.com). Subject: Financial Analyst Role



## **Our Story**

What's with the name? We're glad you asked! Read a little more about the painted porch [here](#). Still have questions? This might help -- we are driven by our *Core Purpose*:

*To help those in our community to live their best lives, and to unlock the human potential for enduring happiness.*

That's not all, though—we have a vision for our team. It's a mandatory part of who we are (no compromises):

- We communicate, even when it gets tough.
- We believe in our mission and care deeply about how we connect with our community.
- Self-actualization (everyone reaching their full potential) is fundamental to how we operate.
- We are passionate about doing amazing and impactful work.
- We work as a team.