Job Description: Wealth Planner and Customer Services Specialist

Due to both continued and anticipated growth, Pinnacle Financial Group is seeking to add an additional team member. The new team member should be self-motivated with relevant financial planning experience to help develop new relationships and grow our existing customer base.

Proven application of all aspects of a client's financial picture, including investments, insurance strategies, tax planning, education planning, retirement planning, and estate planning. Excellent verbal and written communication skills; detail oriented; able to manage many time sensitive tasks simultaneously; pro-active self-starter. Preparing and delivering presentations to organizations for business development and educational purposes.

The new team member will eventually serve as primary point of contact for the client. Solid strategy knowledge and relationship management skills are extremely important. In addition, the new team member will need to be able to participate in client meetings and contribute their knowledge in collaboration with the other team members.

Pinnacle Financial Group is a fun and dynamic work environment where you can expect your co-workers to have high expectations of your performance and you should expect the same from them. Candidates must be able to work well on a team and be open to varying responsibilities.

Compensation is commensurate with experience. Pinnacle Financial Group offers our employees 401(k), health insurance, and life insurance.

Responsibilities:

- Responsible for various client needs including, but not limited to, estate planning, retirement income needs analysis, cash flow, net worth statements, and monitoring wealth transfer vehicles.
- Work with clients to ensure action items are thoroughly executed and documented.
- Review quarterly client asset reports and work with client's financial partners to ensure investment needs and goals are met.
- Prepare materials for and participate in client meetings.

Requirements:

- 1-3 years of industry experience, financial planning experience a plus.
- Bachelor's degree and Wealth Planning
- Current Securities License – 65 / 7 preferred or willingness to obtain licenses
- Strong attention to detail, poised, organized and keen sense of urgency.
- Exceptional communication and presentation skills.
- Prior experience with eMoney and SalesForce preferred
- Strong Excel skills and experience with Microsoft Office products a plus

This position must pass a FINRA Security check (fingerprint), background and credit check.

Company Background:

- Pinnacle Financial Group is a firm which provides comprehensive wealth management services and employee benefits to individuals, corporations and institutions.
- Website – pfgonline.net

If interested please fax or e-mail your resume to:

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