Financial Planning Professional Opportunity

Join a true ensemble of experienced financial professionals working together to provide holistic financial planning for client families. We are looking for someone who:

- Is passionate about helping people make the best decisions for their financial lives.
- Enjoys providing holistic financial planning to clients, and wants to get more deeply involved in personalized advice and implementation.
- Is a lifelong learner, interested in learning more about financial planning and communications within a planning team.

Our new planner will:

- Maintain relationships with clients within the team environment.
- Learn our comprehensive planning process, with the goal of becoming the subject matter expert in our firm for one or more planning modules.
- Work with the team to create, design, develop, implement, and monitor client financial plans.
- Commit to their own professional development and contribute to the improvement of the firm.

This is a salaried opportunity and is not a sales role.

For our clients, we believe:

- Financial life planning is an ongoing process, revolving around holistic, objective, individualized financial advice in areas of goals, cash flow, tax, estate, insurance, and investments.
- Disciplined investment management is part of the planning process and is based on long term tactical asset allocation.
- Plan implementation is our responsibility, partnering with the client to make sure agreed upon actions are completed.

For our team, we believe:

- Open and direct communication is needed to share information and work together well.
- All questions are good questions and mistakes are opportunities to improve.
- Reliability and integrity are important for us and our clients.
- Work-life balance is important for each of us and we should create great lives for ourselves as well as clients.
- Work should be rewarding and fun, and the people we work with and for should bring joy and respect to our lives.

YOU SHOULD HAVE

- Completed AT LEAST the first step of the CERTIFIED FINANCIAL PLANNER™ certification requirements by finishing the CFP® curriculum [Education].
- Taken or be prepared to take the CFP® exam [Examination].
- Thought about or completed three years of experience providing financial plans and advice directly to clients [Experience].
- Agreed to adhere to high standards of ethics and practice [Ethics].
- Analytical thinking, openness to learning new things, and quality focus.
- Strong computer skills, especially with MS Excel, Word, and Outlook. Experience with eMoney, Salesforce, and/or Black Diamond is a plus.
- Ability to manage multiple tasks and work within collaborative environment.
- Intellectual curiosity, the ability to deal with ambiguity, and an entrepreneurial spirit.
- A passion for excellence, respect for others, and expect a lifetime of learning.
- Customer service, communication (both written and verbal), and presentation skills.
- Excellent time management, good self-structure, and strong initiative.

About Life Planning Partners

Life Planning Partners is a boutique financial planning firm in Jacksonville, Florida, registered with the SEC and a member of NAPFA. As an ensemble firm with two CERTIFIED FINANCIAL PLANNER™ professionals currently and a Chartered Financial Analyst, we are able to provide “deep dive” financial planning and handle much of the plan implementation for our clients. Founded by Carolyn McClanahan, M.D., a former ER physician, LPP focuses on planning for today AND planning for an uncertain tomorrow.

Email LPPOpportunity@gmail.com with your interest.