The
Retirement
Planning Specialists
Fee Only • Fiduciary • CFP®

Financial Planning Associate

Position Summary:

The Retirement Planning Specialists, LLC is a fee-only Registered Investment Advisory firm located in Greenwood Village, Colorado. The firm manages $212 million in assets and serves approximately 225 advisory clients. The primary role of the Financial Planning Associate will be to work directly alongside Senior financial planners to provide comprehensive retirement and financial planning services to clients. The Financial Planning Associate will also be involved in investment management analysis and support for the firm's advisory clients. Additionally, the Financial Planning Associate will learn about and be involved in implementing key business-related aspects of running a financial planning practice. This is not a sales position and there are not any business development requirements as part of this role.

Role Responsibilities:

- Actively participate in client meetings to develop an understanding of their situation and begin to provide advice regarding their financial circumstances and objectives.
- Provide thorough and timely follow-up related to actionable items from client meetings and requests, as well as follow-up for day-to-day client needs as they arise.
- Develop long-term retirement planning projections using information gathered from/provided by clients, and input into the firm's financial planning software, Money Guide Pro.
- Analyze and provide recommendations related to other financial planning issues, such as Social Security analysis, portfolio distribution planning, and tax analysis.
- Assist in preparation for client meetings, including development of agendas, reports, and other necessary preps.
- Learn about The Retirement Planning Specialists investment philosophy, how we think about investments, and the implementation of that philosophy into client investment portfolios.
- Complete investment portfolio-related analysis, including trading in client accounts and processing rebalances.
- Develop Excel models used to analyze and project one-off client questions and scenarios.

Education and Certifications:

- Bachelor's Degree in financial planning or finance-related degree.
- Intention to and/or on-track to sit for the CFP® exam.
- Series 65 within 6-months of employment.
- 3.5 GPA or higher strongly preferred.

Candidate Qualifications:

- Highly motivated, with strong work ethic and desire to learn and improve as an advisor.
- Exceptional attention to detail and is well-organized.
- Excellent interpersonal and communication skills – able to make clients feel valued and at ease.
- Strong analytical abilities and is able to conceptualize often complex financial scenarios.
- Ability to comport themselves in a warm but professional manner – able to connect with clients.
- Familiarity with Excel and confidence in ability to construct fairly complex spreadsheets/models.
- Possess well-developed written and verbal communication skills.
- Experience with – or passing knowledge of – different investment accounts and financial products that clients may typically own.
- Open and receptive to feedback and coaching.

Salary:

- Commensurate with experience and skill set, and a lot of opportunity for growth.

Benefits:

- Paid time off starting at two full weeks and increasing with tenure.
- Health insurance.
- Employer-funded 401k contributions.

To Apply:

Interested candidates may apply through CSU Handshake or forward resumes directly to both Sean Curley at SCurley@RPSpecialists.com and Michael Beaulieu at Michael@RPSpecialists.com