**Job Posting - Research & Planning Associate**

TLWM Financial is a financial planning and asset management firm seeking a talented individual to join the team as a research and planning associate. The focus of this position will be to become a valuable member of both the financial planning and investment teams as outlined below. A competitive candidate must have strong analytical skills, a natural curiosity, and possess a good understanding of capital markets. Prior financial services experience, and progress toward CFP® certification is preferred.

**Financial Planning**: the planning associate (paraplanner) is primarily responsible for contributing to and managing all aspects of the financial planning process in collaboration with other members of the financial planning team, and our team of relationship managers. Specific responsibilities include:

* Manage every aspect of the financial planning process
* Initial plan creation utilizing planning software to analyze information received and determine planning recommendations with senior members of the planning team
* Generate ad-hoc reports and research one-off planning questions
* Generate portfolio proposals for use with both prospective and existing clients.
* Communicate and interact with wealth advisors and clients to present financial planning recommendations.
* Generate and process paperwork as needed

**Research**: the research associate will provide support and analysis to the Investment Committee through the analysis of fundamental and technical data. Responsibilities include:

* Provide fundamental and technical research analysis to the Investment Committee
* Monitor changes and developments in global economy and stock market
* Assists in developing client event presentations
* Performance analysis
* Work on various one-off research projects

**Knowledge, Skills & Abilities:**

* 1-2 years in a financial services role preferably financial planning focused
* Progress toward CFP® certification a plus
* Excellent analytical skills
* Strong technical skills, especially with Excel
* Positive attitude
* Excellent organizational and time management skills
* An ability to handle multiple tasks, prioritize workload, and meet deadlines