Roell Capital Management is a boutique financial planning firm in the heart of Milwaukee's downtown financial district. Our clients are highly-paid executives for local corporations, although we work with a true cross-section of individuals. We are seeking a professional, extremely detail-oriented CFP for full-time employment. This person will help construct comprehensive financial plans delivered to our clients. You will be the second member of our financial planning department.

Duties and Responsibilities:

1. Run fact-finder meetings along with the senior financial planner to gather information.
2. Input gathered data into financial planning software (eMoney)
3. Analyze data using various tools provided (Monte Carlo simulations, what-if scenarios, etc.)
4. Develop recommendations specific to the client and their financial situation on a variety of topics including financial position, risk management, cash flow, estate planning, tax planning, investment allocation, and retirement planning.
5. Write a comprehensive financial plan that includes your recommendations and supporting data.
6. Be willing to work with the primary advisor on any corrections needed.
7. Help with layout and design of the plan itself as needed.

Requirements:

-4 year undergraduate degree (financial studies preferable)
-Have written comprehensive financial plans before (very important)
-knowledge with eMoney software
-CFP designation (or completing soon) or a Financial Paraplanner Qualified Professional designation
-Excellent writer
-Good person
-Local or willing to relocate.

You will be asked to submit a writing sample during the interviewing process.

Salary is very competitive, benefits offered are comprehensive and excellent and our team is great. Come join us!