Stewart & Associates PLLC
WEALTH MANAGERS

Financial Planner

Stewart & Associates, PLLC, a fee-only wealth management firm, is seeking an individual who has recently achieved, or is working toward, CFP® certification to join the company's office in Missoula, Montana. Our strong commitment to helping clients achieve their financial goals has led to the establishment of many gratifying, long-lasting relationships with them. While most of the work will be developing and implementing investment strategies, there will also be involvement in educational savings, retirement, tax, and estate planning. The ideal candidate will aspire to gain an ownership share in the company.

Responsibilities

- Conduct analysis of client portfolios and, where warranted, develop recommendations for modifications to existing allocations.
- Assist clients in implementing portfolio recommendations.
- Assess client risk tolerance.
- Meet with clients on a regular basis (typically quarterly).
- Generate retirement income projections.
- Prepare market summary and portfolio performance reports.
- Analyze other client financial circumstances (e.g., educational savings and estate plans, taxes, insurance needs).
- Respond to client ad hoc requests for information or investment recommendations.
- Collect, organize, and maintain client and asset return data.
- Interact with accountants, attorneys, and other professionals on behalf of clients.

Basic Qualifications

- Bachelor's degree (or higher) from a regionally-accredited college or university.
- Knowledge of Microsoft Office applications (Excel, Word, Outlook).
- CFP® professional or willingness to complete the CFP® certification requirements.
- Successful completion of the Series 65, Uniform Investment Adviser Law examination, or willingness to complete the Series 65 requirement relatively soon after employment.
- Strong organizational skills, accuracy, and attention to detail.
- Excellent communication skills.

Company Benefits

- A collaborative, informal work environment.
- Competitive salary.
- Health insurance.
- Contributions toward SEP IRA.
- Vacation time.
- Fitness club dues.
- Educational reimbursement.

If interested, please send resumé, cover letter, and transcripts to richard@fstewartfinancial.com.

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