

## **Associate Planner**

### **About Us**

At TrustCore, we strongly believe that money should be used as a tool to create a life that is fulfilling and meaningful. From the individuals we partner with to the nonprofits we serve; we love getting to know our clients and uncovering their goals. We strive to deliver financial strategies that can support you today and fuel the dreams you want to live out tomorrow.

Based in Brentwood, TN (suburb of Nashville), TrustCore is privately owned and operates independently from any other financial services company. Serving clients since 1984, we are consistently ranked among the top wealth management firms in the U.S.

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### **Position Overview:**

TrustCore Financial is seeking an Associate Planner (AP) to work in our Brentwood, TN office on a successful financial-planning team. The AP works in a supporting role to prepare financial plans and provide service to clients.

### **Summary of Essential Duties & Responsibilities:**

The Associate Planner will participate in all aspects of the financial-planning process and develop comprehensive financial plans with specific recommendations on products and services that best meet the client's needs. The Associate Planner will serve as "second chair" in client meetings along with a Senior Planner. Develop strategies unique to each client using critical thinking and in-depth analysis. The AP will be responsible for client-meeting preparation as well as follow-up tasks internally and directly with clients. Perform other job-related duties as assigned. Maintain compliance with all company policies and procedures.

### **Qualifications & Requirements:**

- Bachelor's degree in financial planning, accounting, or finance required. Master's degree a plus.
- A minimum of 2 years investment industry experience.
- CFP (Certified Financial Planner), CPA (Certified Public Accountant), or CFA (Chartered Financial Analyst) charterholder or progress towards one of these designations.
- Strong attention to detail and ability to work independently and in a team setting.
- Excellent verbal and written communication skills.
- Proficiency with Microsoft Office365.
- Experience with financial software such as MoneyGuidePro and Tamarac a plus, as well as knowledge of Charles Schwab custodial platform technology.

### **Associate Planning Position Details:**

The ideal candidate will thrive in a supporting role to prepare high quality financial plans and provide service to clients.



Competitive salary based on skills and experience. Company paid health, dental, vision, life insurance, 401(k), holidays and PTO (Paid Time Off).

**To Apply:**

Submit your resume to:

LaRue McIntyre, email: [larue.mcintyre@trustcore.com](mailto:larue.mcintyre@trustcore.com) or fax: (615) 850-8081

Chevelle Capers, email: [Chevelle.capers@trustcore.com](mailto:Chevelle.capers@trustcore.com) or fax: (615) 208-5485