UNITED CAPITAL
FINANCIAL LIFE MANAGEMENT™

Financial Guidance Specialist- Irving, Texas

We are an independent, advice-based Registered Investment Adviser with private wealth counseling firms strategically placed across the United States including locations in California, Texas, Florida, Washington DC, Nevada, and Illinois.

Our position is for a Guidance Specialist at our Guidance Department Group in Irving, Texas. The Guidance Specialist will be working directly with our advice team that supports each of our regional offices, and will be responsible for aiding in the preparation of client deliverables, support to our regional offices, and research on new planning initiatives.

Job duties will include:

- Data integrity and input into financial planning and investment management software
- Updating and management of various advice metrics in SalesForce (CRM system)
- Data management and manipulation of client data in various systems
- Preparing and tracking various planning documents for our regional firms
- Web / video / phone conferencing with regional firms discussing implementation of advice
- Client relationship development and management, including ongoing and regular client contact and communications
- Client service, including planning updates, portfolio changes and reviews, returns and new opportunity identification
- Client management, including coordination of complete financial planning and wealth management (analysis, estate planning, tax expertise for assets under management and portfolio review)
- Acts as a subject matter expert for financial planning and modeling to regional offices and corporate
- Responsible for creating and maintaining software and financial planning training documents and how-to guides
- Assists regional offices with client support by educating offices and periodically participating in client engagements
- Assists corporate with various company initiatives to provide growth, sustainability, and organizational continuity
- Providing essential planning support and expertise to regional offices to ensure offices are able to maintain consistent standards on client deliverables
- Responsible for all software audits both monthly and quarterly
- Assist with various data entry projects
- Responsible for completing and maintaining various logs and reports
- Document department meetings as needed.
- Responsible completing various portfolio updates.

UNITED CAPITAL
FINANCIAL LIFE MANAGEMENT™

Candidate's strengths will include but not limited to:

- A positive attitude
- Detail-oriented
- Highly personable with good listening skills
- Ability to multi-task in a fast-paced environment

Qualifications:

- A bachelor's degree from an accredited university, preferably with a CFP® Program
- Experience with retirement, tax, estate, insurance planning ideal
- Proficiency with Word, Excel, PowerPoint, Outlook, and various financial planning software
- Strong analytical and planning capabilities, detail-oriented with a high degree of accuracy
- Excellent communication and listening skills
- Client first attitude
- Team player, collaborative, and able to work with and through others

This role is vitally important and requires an individual who is motivated, eager to learn and has a mentality of ownership. The candidate should be on a financial planning track with a goal of obtaining the Certified Financial Planner™ designation. Experience with Albridge, SalesForce, Envestnet, Morningstar™, Financeware™, MoneyGuidePro, eMoney, or other financial planning software is extremely valuable.

Please visit our website at www.unitedcp.com to learn more and email your resume and cover letter to Jarrod Upton at jarrod.upton@unitedcp.com.