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JOB DESCRIPTION

Title: Financial Planning Associate
Supervisor Title: Director of Financial Planning

JOB SUMMARY

The Financial Planning Associate is an entry level position that provides technical and client service support for Financial Planners and Advisors. Responsibilities include preparation and follow-up on client meetings, data gathering, financial plan and scenario modeling, and presentation development. Associates may participate in client meetings but not in an advice or decision-making capacity.

JOB RESPONSIBILITIES

Responsibilities include but are not limited to:

- Provide support for comprehensive financial planning clients by gathering data, developing financial plan analysis, packaging and posting meeting materials, and managing meeting notes and action items
- Provide support for investment management only clients by preparing and participating in client meetings, managing meeting notes and action items, and preparing tax checklists
- Prepare financial plan updates for specified clients
- Provide mortgage and insurance application completion assistance for clients
- Other projects and research at the discretion of Advisors and Financial Planners, including Business Partner collaboration and execution of internal initiative tasks

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JOB REQUIREMENTS

Education:
Bachelors degree and completion of a CFP Board registered Certificate Program required.

Other:

- Team player, collaborative, able to work with and through others
- Highly proficient technical skills with the ability to analyze quantitative and qualitative information
- Ability to make effective decisions using impeccable ethical judgment
- Excellent verbal and written communication skills
- Strong client service skills
- Detail-oriented, accurate, organized, able to set priorities
- Results driven, with the ability to take initiative
- Desire to engage in continuous learning to ensure currency of knowledge and skills