



WEALTH PARTNERS

Master What's Next

JOB DESCRIPTION

Title: Certified Financial Planner

Supervisor Title: Director of Financial Planning

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JOB SUMMARY

The Financial Planner is responsible for preparation of client financial plans, review of case analysis and modification, recommendation of strategies and client communications.

JOB RESPONSIBILITIES

- Build and maintain client relationships.
- Develop financial plans for new and existing clients with alternatives and recommendations, and frame the plan for delivery to the client.
- Prepare all necessary tools for client meetings and be knowledgeable of client situations (special issues, additions, withdrawals, income tax bracket, preferences, etc.).
- Attend client meetings in a technical and support role.
- Present recommended strategies to clients and other wealth management team members.
- Work with allied professionals on the client's behalf as necessary to develop and update financial plans as well as fulfill client requests.
- Buy and sell securities as needed; complete trade corrections quickly and efficiently.
- Execute client action items and exhibit timely communication with clients.

JOB REQUIREMENTS

Education: Bachelor's degree. 2-5 years' experience OR 5+ years' experience. We could see either option being a potential fit.

Licenses/Certifications: Have met all requirements to be a practicing CFP.



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Experience: Minimum of five years of experience in dedicated financial planning position 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.