Title: Financial Planning Associate
Supervisor: Director of Financial Planning

JOB SUMMARY
At Aspyre, the Financial Planning Associate plays a key supporting role in helping clients live intentionally and make confident decisions about their future. This position is designed for someone who is passionate about financial planning as a tool for transformation and is eager to grow into a full advisory role.

You will work closely with senior advisors to co-create and implement thoughtful financial strategies, support client relationships, and contribute to the delivery of holistic planning. Your work will help clients experience clarity, confidence, and purpose in their financial lives.

This role is ideal for someone who thrives in collaborative environments, enjoys meaningful client interaction, and is committed to continuous learning and development.

You will live out Aspyre's core values:

Innovate and Get Better: Embrace change and seek continuous improvement.
Be Great at What We Do: Deliver excellence with integrity and care.
Create Raving Fans: Build trust through exceptional service and connection.
Making Life Count®: Help our clients and team live with purpose and fulfillment.
Team First: Support each other, collaborate openly, and succeed together.

Key Responsibilities
Client Strategy & Relationship Building

- Assist senior advisors in managing client relationships, preparing for meetings, and following up on action items.
- Participate in client meetings, taking notes, providing insights, and helping clients feel supported and understood.
- Build rapport with clients by understanding their values, goals, and life transitions.
- Serve as a consistent point of contact for client inquiries and service needs.

Strategic Planning & Collaboration

- Help develop and maintain comprehensive financial plans using planning software and internal tools.
- Coordinate with internal teams and external professionals (CPAs, attorneys, insurance specialists) to support client strategies.
- Prepare reports, analyses, and recommendations that are clear, actionable, and aligned with client values.
- Contribute to the refinement of planning workflows to enhance client experience and operational efficiency.
- Streamline client interactions and planning workflows to ensure a smooth, responsive, and personalized experience. Help clients get things done.

Growth & Development

- Engage in ongoing training and development to deepen financial planning knowledge and client service skills.
- Stay informed on industry trends, regulatory changes, and best practices.
- Participate in team initiatives, process improvement efforts, and community engagement.
- Progress toward becoming a lead advisor with increasing responsibility over time.

Qualifications

- Bachelor's degree in a relevant field (Finance, Financial Planning, etc.).
- Progress toward CFP® certification required.
- 2-4 years of experience in client-facing financial services or advisory support.
- Strong interpersonal, organizational, and communication skills.
- Passion for helping people live meaningful lives through thoughtful financial guidance.

Why Join Aspyre?

We believe financial planning is about living well today while planning for the future—it's about Making Life Count®. At Aspyre, you'll be part of a team that values connection, purpose, and excellence. We invest in our people so they can grow, thrive, and help our clients do the same.