

**Company:** Mercer Advisors  
**Position:** Financial Planner  
**Location:** Walnut Creek, CA 94596

*We are also hiring in San Francisco.*

### **Company Overview:**

Mercer Advisors is a fee-only, independent RIA whose purpose is helping our clients achieve Economic Freedom. Established in 1985 as one of the nation's first fee-only financial planning firms, we have a rich legacy of operating exclusively as a fiduciary. Unique to many RIAs we offer a full-suite of services all in house for our clients including investment management, financial planning, estate planning (in-house law firm), tax planning and preparation (on staff CPAs) and trustee services. With over \$11 billion in assets and 8,000 clients we are growing rapidly through both organic and inorganic growth (11 acquisitions in last two years). We are looking for talented, motivated people like you who can add to the growth of our business and culture.

For more information on Mercer Advisors, please visit <http://www.merceradvisors.com>.

### **Job Summary:**

The Financial Planner assists the Branch Manager in reviewing, analyzing and delivering financial planning modules to clients. Working with the Branch Manager, Client Advisors, Client Associates, Client Administrators and Regional Vice Presidents, the Financial Planner is an integral member of the branch client service team.

### **Essential Job Functions for the Financial Planner will include:**

- Providing advanced planning support to Client Advisor and Branch Manager in the areas of investments, tax, pension, estate, insurance and general financial planning
- Supporting in servicing clients by preparing for meetings, developing presentation materials and providing reviews and ad hoc reporting
- Managing the financial planning workflow to support the Client Advisor and Branch Manager's commitments to clients and meet post client meeting delivery deadlines
- Establishing and developing strong relationships with clients and participating in client meetings with Client Advisor and Branch Manager or independently
- Dispensing financial planning advice in both supervised and unsupervised environments
- Delivering financial planning support that results in increased referrals and high client retention
- Acting as a trusted advisor through preparation and delivery of advice to clients within the context of the Financial Planner's knowledge and training
- Collaborating with other team members and departments including Investments and FWS
- Providing support and training to Client Associates and Client Administrators
- Ensuring adherence to company standards of client care, meetings, referrals and retention
- Other duties as needed

### **Required Knowledge, Skills and Abilities:**

- Bachelor's degree from an accredited institution (preferably Business, Economics, Accounting or Finance related)
- CFP® designation or able to provide documentation of passing the CFP® board examination required
- Series 65 or 66 license required if the candidate has passed the CFP® board examination but does not yet meet the experience requirement to use the designation
- Minimum 2 years of financial industry related experience
- Client-facing experience preferred
- Excellent verbal, written, analytical and organizational skills
- Proficiency with MS Word, Excel, PowerPoint and Outlook; experience with Salesforce and financial planning software preferred
- Technical and analytical training and experience in financial planning
- Demonstrated flexibility, versatility and ability to manage multiple priorities and deliver to tight deadlines in a team environment
- Ability to work without close supervision managing and prioritizing deliverables
- Must be highly flexible and confidential with all matters
- Ability to travel up to 20% required

**Work Schedule:** Daytime hours

**Working Conditions:** Professional office environment, daytime hours, working inside, standing, and sitting, will be assigned to a work station, no heavy lifting over 10 lbs. Travel assumed up to 20% of the time.

**Benefits:** We can offer you an exciting, fast-paced working environment, and the opportunity to play a vital role in our growth. Mercer Advisors is an equal opportunity employer offering a competitive salary and benefit package.

**To Apply**

Interested candidates please submit an application via our career website: <http://www.merceradvisors.com/careers>

For more information on the position, please email [jennifer.mcbride@merceradvisors.com](mailto:jennifer.mcbride@merceradvisors.com).