Financial Planning Associate

Status: Full-time
Start Date: July 2018

One of Concentric Wealth Management's core values is providing exceptional client service. We believe that the ability to deliver exceptional service is based heavily upon attitude. As a result, we seek to hire professionals with a positive attitude and an outstanding track record in client service. We are currently seeking to add another exceptional employee as an integral member of our small team.

What We Are Offering:

- A rewarding and personally fulfilling career with a work-life balance
- An opportunity to learn, expand responsibilities, develop professionally, and advance in your career path
- A chance to roll up your sleeves and start working with real live clients and collaborate with all members of our professional team on a variety of tasks

What You Will Get to Do:

- Meet with clients, showcase our expertise, and deepen client relationships
- Build expertise in all aspects of financial planning including investments, income tax, retirement, social security, insurance and estate planning
- Prepare comprehensive financial plans using NaviPlan software and Excel worksheets
- Present financial plans and recommendations to clients
- Identify follow-up actions required and track outstanding tasks
- Participate in the investment portfolio management process from research to implementation
- Engage with new clients, onboard new accounts, and execute asset transfers

What You Bring to the Job:

The Financial Planning Associate position typically requires the following qualifications:

- Client first attitude
- Desire to help clients reach their financial goals
- Excellent written and verbal communication skills
- Must be organized, meticulous, and detail-oriented
- Ability to work successfully in a small company environment
- Proficiency in Word, Excel, PowerPoint, Outlook, CRM software
- CFP designation (ideal) or committed to completing the process
- Familiarity with Junxure, Portfolio Center, NaviPlan, Tamarac, or CFS Tax Tools a plus
- Two years of experience in either customer service or the financial services industry

Salary and Benefits Package

- Compensation consists of a competitive base salary, plus individual incentive bonus and company incentive bonus
- Full health insurance coverage for employee
- Immediate participation in our 401(k) plan with dollar for dollar employer matching up to 4% of compensation
- Paid CFP certification dues and FPA membership
- Financial support for professional certficiation, continuing education requirements, and conferences
- Concentric appreciates the value of a balanced life

Applications

Qualified applicants should submit a cover letter and their resume to Concentric Wealth Management at Careers@Concentric-Wealth.com.

Concentric Wealth Management is an Equal Opportunity Employer