Part-Time Financial Planner

Who We Are:

Lodestar Private Asset Management is one of the pre-eminent independent investment advisors in the Bay Area, located in Alamo, California. We are a multi-year CNBC Top 100 Fee-Only Wealth Management firm offering comprehensive investment advisory services to high net worth clients. We have four active Principals, each of whom is passionate about improving the quality of our clients' lives. We seek to add a new team member to assist us with this mission.

Who You Are:

The role of the Part-Time Financial Planner is to work directly with one of the firm's Principals in managing existing client relationships. Do you want to be in the financial services industry, are looking for a gratifying meaningful experience, but only want to work part-time? We need you!

You will be expected to help deliver financial planning and portfolio management to a select group of high net worth clients in an open, friendly, and fun office environment. As part of our advisory team, you will be involved in all aspects of the client relationship.

Responsibilities include:

- Actively developing and reviewing financial plans for clients.
- Assist with reviewing and rebalancing client portfolios.
- Join in the firm's investment committee meetings to generate new investment strategies.
- Participate in client meetings: meetings with local clients face-to-face, and national clients via video conference or phone.
- Responsible for pre-client meeting activities, such as gathering data, preparing agendas, and reviewing portfolios.
- Responsible for post-client meeting activities, such as developing meeting summaries, updating financial plan changes, and coordinating planning implementation.
- Working with our key institutional partners, including Charles Schwab, JP Morgan, Goldman Sachs, Vanguard, BlackRock, PIMCO and several others.
- Develop advanced skills with our primary technology tools, including MoneyGuidePro, Morningstar, and Redtail.
- Review and update client risk tolerance and investment policy statements.
- Coordinate with other financial professionals (CPAs, estate planning attorneys, insurance consultants) to implement comprehensive wealth management services.

Education/Qualification/Experience Requirements:

- College Degree
- Two years or more of financial planning/investment management experience
- CFP Designation- preferred or in progress of completing paperwork
- Organized and strong attention to detail
- Solid financial and analytical skills
- Possess emotional intelligence and excellent interpersonal skills
- Strong verbal and written communication skills
- Must be an independently motivated problem solver and a team player willing to wear different hats in a small office environment.
- Curiosity is expected and having fun is a must!

Benefits:

- Position qualifies for CFP Board two-year work experience requirement
- Competitive salary with firm performance-based bonus
- 401(k) company contribution
- Paid professional dues
- Mentorship from firm's Partners and daily learning opportunities
- You will have flex-time schedule, between 24 and 32 hours per week, depending on your circumstances and the firm's needs

What to Do Next:

Qualified candidates, send your resume in **PDF format** and provide a phone number or e-mail address where you can be reached. **No phone calls, please.** Thank you for your interest! We welcome your application and/or questions.