Our group is a boutique, fee-based Comprehensive Financial Planning practice. Our team is cohesive, collegial, fast paced and professional. Together, we provide our clients with an extraordinarily high level of service as we deliver Comprehensive Financial Planning services. Guided by our "Clients First" philosophy, we cater to those interested in deeply rooted relationships and guidance through all of life's stages. Our clients can expect unbiased advice and a structured process to help deliver comprehensive and coordinated solutions.

This position is salaried and is not a sales position.

This position is responsible for the last five of six steps in the CFP Board's Financial Planning Process. This individual interacts with clients daily to gather information, analyze information, develop recommendations, implement recommendations and monitor the financial plans of their clients. We are looking for someone that is highly organized, able to learn quickly and proficiently, communicates well, and can work both independently and on a team.

JOB DUTIES RESPONSIBILITIES

- Develop comprehensive financial plans in the areas of retirement planning, protection planning, cash flow and debt management, investment strategies, college planning, tax planning, estate and business planning
- Create detailed action plans for clients to be able to follow to reach their financial goals
- Participates in and conducts client meetings
- Use eMoney financial planning software to enter client data, calculate solutions, creatively explore options to implement comprehensive solutions in strict time constraints
- Maintain and manage all client financial websites (through eMoney software) which includes educating clients
- Communicate with clients as necessary to obtain financial data
- Track financial planning process and prepare correspondence
- Ability to manage multiple projects and tasks simultaneously

REQUIREMENTS/SKILLS

- Bachelor's degree or equivalent work experience required
- FINRA Series 7 & 66 Licensed, CA Insurance License
- Certified Financial Planner (CFP) designation
- 7+ years of experience in the Financial Services Industry
- Strong understanding of financial terms and concepts
- Familiar with web applications and working knowledge of MS Office suite
- Proficient in eMoney financial planning software
- Highly organized, able to learn quickly, problem solving skills, and proficient communicator
- Able to work both independently and on a team
- Strong attention to detail, highly organized, ability to multi task in a fast-paced environment with strong written and verbal communication
- Strong independent judgement and decision-making skills

BENEFITS

- Company offers a comprehensive benefits package that includes: medical and dental insurance, paid time off, retirement plan with a company match, and flexibility.