Ginsburg Financial Advisors, Inc.
Personal Financial Planning & Investment Management
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Associate Financial Planner
Career Opportunity

We are a successful Financial Planning and Investment Management firm located in the Montclair Village Business District of Oakland for over 30 years. Our staff of seven develops and maintains strong relationships with our clients and their families. We are seeking a well-qualified Associate Financial Planner who wants to make our business their new full time professional "home".

As an Associate Financial Planner, you will be a cross-functional team member supporting a variety of financial planning, investment management, and operational-related activities. This is an ideal position for individuals who want exposure to all facets of wealth management while offering a variety of career development opportunities. Specifically, the Associate Financial Planner will assist our Client Advisors ("CAs") and the Director of Investment Management ("DIM") with financial planning and investment management-related activities. Core position responsibilities include managing, gathering and analyzing client data; processing trades; helping prepare financial plans; supporting portfolio management activities; and assisting with the preparation of client quarterly reports.

▲ **Position responsibilities include:**

- Develop and update financial plans and investment policy statements for new and existing clients
- Assist DIM with analyzing and evaluating client investment portfolios, including preparation of proposed portfolio allocation reports
- Supporting ongoing investment research activities and preparation of materials for GFA's quarterly Investment Committee Meetings
- Assist DIM with data management and trading
- Become an in-house "power user" with shared oversight of our portfolio accounting/reporting software and other data management tools and our CRM system; update and maintain our company website
- Collaborate with other office professionals in serving our clients, including establishing new client accounts and facilitating transfers of client cash requests
- Respond to miscellaneous requests from clients, Client Advisors CA's and Director of Investment Management "DIM"

▲ **Qualifications:**

- 4 year college degree
- A minimum of five years business experience required; three in a financial services role is desired but not required
- Superb communication skills; must demonstrate an ability to empathize with others (i.e. put yourself in a client's shoes) and understand a client's perspective
- Genuine desire to help others reach their personal and financial goals
- Proficient use of MS Office (Word & Outlook; extensive experience with Excel)
- Self-motivated; high integrity; strong work ethic; good sense of humor
- Attention to detail and accuracy; ability to multi-task in a fast-paced environment
- Certified Financial Planner™ Designation or actively pursuing the CFP® Designation (or planning to purse this designation) is a plus
- Career changers are encouraged to apply (we have two as part of our team)

▲ **We Offer:**

- Competitive Compensation and benefits package
- Career advancement and a path towards achieving your career goals
- Mentoring from experienced and successful financial professionals
- An environment that promotes the importance of a healthy work-life balance
- Opportunity to work with a stable and growing business where you can make a difference and be appreciated for your contributions
- For more information about us, please visit our website: www.GinsburgAdvisors.com or the website of our affiliated broker dealer: www.CeteraNetworks.com

▲ **How to apply:**

Via email (as attachments): Please send your resume and a personalized cover letter that tells us a little bit about you to LGinsburg@GinsburgAdvisors.com. Please include your salary history and requirements.

*Please note, when an offer is extended the following may occur: verification of professional and personal references, education and prior employment; credit check; criminal background check; personality profile testing. We comply with the federal regulations of FINRA and the SEC.