SENIOR FINANCIAL PLANNING ASSOCIATE – Full time in Walnut Creek

Excellent opportunity within the financial services industry.

Looking for a team player who is interested in a long-term opportunity to grow and advance, helping shape an already successful financial planning firm. Individual must be detail and service oriented, able to prioritize and manage multiple projects, and work in a fast-paced environment.

In addition, the appropriate candidate will possess the following attributes:

- Strong verbal and written communication skills
- Cool and calm under pressure
- Proficient in technology platforms, including Microsoft Word and Excel
- Good listener
- Enjoys working with the public, presenting financial plans to clients
- Independent and self-motivated
- Problem solver, ability to look ahead and understand future steps necessary
- Enthusiastic
- Flexible
- High energy
- Excellent organizational skills and great attention to detail
- Professionalism
- Able to maintain confidentiality and adhere to strict compliance regulations

Work responsibilities will include the following:

- Enter data using Financial Planning Tool Suite – Money Guide Pro
- Examine client data for accuracy and completeness
- Review and interpret client's financial statements
- Prepare preliminary financial planning recommendations and review/edit them for accuracy and completeness
- Maintain client contact during the financial planning process
- Deliver financial planning strategies and advice directly to clients
- Review and update client information as needed for client review meetings
- Write notes or letters to clients
- Supervise junior associate(s)

Qualifications

- Minimum 5 years financial planning experience in financial advisory services firm with demonstrated ability to develop and manage client relationships, while working through the development and delivery of the financial plan

- Deep working knowledge of current estate and tax laws and related planning strategies.
- Ability to train and develop junior associate(s)
- Minimum Bachelor's Degree
- Current CFP designation or in process
- Series 65 or equivalent
- Proficiency in Excel, as well as portfolio management software
- Tamarac and Salesforce experience a plus
- Financial planning software experience – Money Guide Pro preferred

This is **not** a sales position.

Competitive compensation, based on experience. Benefits are available. Benefits include health care, dental, 401(k)

This position is located near the Walnut Creek Bart station.

Please submit cover letter and resume in Word or PDF format to teresariccobuono@yahoo.com.

Instructions for applying for this position:
Resumes will not be accepted without a cover letter that states why you would be a good fit for this position and the compensation range you wish to discuss. Also in your cover letter, please describe your three most defining characteristics or attributes. This exercise is meant to show us your writing skills and ability to follow directions as well as to help us get to know you. Note that you must follow these exact instructions or your resume will be rejected. Thank you.