destination
WEALTH MANAGEMENT

Destination Wealth Management is a rapidly growing Wealth Management firm with an opening for a Financial Planner. This is an opportunity for an intelligent, positive, and responsible person with high initiative, strong communication skills, and a desire to learn.

Financial Planner Job Description

- Assist a team of 15+ Wealth Advisors in
  - Analyzing clients' financial data gathering to provide Wealth Advisors with financial planning recommendations.
  - Attending client meetings as subject matter expert for specific planning topics
  - Researching of specific financial planning topics.
- Provide comprehensive financial planning strategies that include but not limited to the following
  - Estate
  - Tax
  - Retirement
  - Cashflow
  - Social Security
  - Pension
  - Stock Options
  - Insurance
  - Debt
- Administer and maintain the following Financial Planning Software
  - MoneyGuidePro (MGP)
  - Social Security Timing
  - BNA Tax Planner
- Run quarterly audits on financial planning at firm level to maintain compliance standards.
- Develop, implement, and maintain policies and procedures on ongoing basis for the Financial Planning Department.
- Prepare agendas and run presentations for occasional financial planning meetings with Wealth Advisory Team to discuss best practices on financial planning subjects.
- Keep Advisor team up to date on current events related to financial planning.

Qualification and Skills

- Comprehensive knowledge of topics related to financial planning
- Experience in financial planning software (MoneyGuidePro, BNA, Salesforce)
- Experience with excel and Adobe
- Strong interpersonal aptitude and solid work ethic
- Exemplary written and verbal communication skills

Education and Experience Requirements

- CFP Certification (preferred)
- Bachelor's degree in business or related field
- 2 + Years of experience in the financial industry