Financial Planning Associate

Job Details

Job Location
Walnut Creek - Walnut Creek, CA
Position Type
Full Time
Salary Range
$70,000.00 - $85,000.00 Salary/year

Description

EP Wealth Advisors Admin, LLC ("EPWA") is a wealth management advisory firm with over $15 Billion in AUM as of December 31, 2021, serving predominately high net worth individuals. EPWA fosters an inclusive environment that offers opportunities for our associates to learn, grow and enhance their skills to take on new challenges to progress in their professional careers.
Our office in Walnut Creek, CA is hiring for a Financial Planning Associate. The Financial Planning Associate works jointly with the advisors in reviewing, analyzing, and delivering financial plans to clients. You will join a team of dynamic, collaborative, and client-focused professionals who are focused on delivering on our founding core values: Integrity, Entrepreneurial, Excellence and Community.

Duties and Responsibilities

- Develop customized and comprehensive personal and business financial plans
- Maintain client relations by distribution of client questionnaire, data collection, analysis, and review with team to identify key measures within the financial planning system
- Utilize financial planning software to generate financial plans, run analysis on tax strategies, real estate, charitable planning and additional areas to supplement financials
- Develop presentation material and review with advisor teams
- Establish and develop relationships with clients by participating in meetings guiding goal setting strategies
- Present action plans for clients relative to the specific recommendations made in their financial plan
- Optimize department practices and implement strategies to determine changes and upgrades necessary to maximize opportunities with clients and potential clients
- Collaborate with other team members and departments to enhance systems and develop processes that increase workflow and generate new business
- Conduct analysis of trends and forecasts, recommendation actions for optimization, and perform ongoing research as required by the Director of Financial Planning
- Proactively engage in firm wide initiatives developing services and building firm relationships
- Adhere to all company policies and procedures and perform business functions with focus on consistency, quality, and compliance

Qualifications

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- Bachelor's degree (preferably Business, Economics, Accounting or Finance related)
- Minimum 2 years of financial service related experience
- CFP designation or coursework in progress
- Knowledge of financial planning software; eMoney or Money Guide Pro preferred
- Strong interpersonal skills, productive working within a team structure
- Technical and analytical experience in measuring data
- Excellent written and verbal communication, and presentation skills
- Ability to organize and prioritize workflow and assignments in a deadline oriented environment.
- Demonstrates attention to detail and accuracy
- Ability to work independently and exercise discretion without immediate supervision at all times.
- Proficient in Microsoft Office and CRM software

What We Offer
We offer a highly competitive suite of holistic benefits designed to help our team members balance their personal and professional life commitments. These include options designed to encourage employee's health, happiness, and financial well-being.

- 11 Paid Holidays
- 3 Weeks (PTO)
- Paid Volunteer Time
- Flexible Work Schedule
- Highly subsidized Health, Dental, and Vision Plans
- 401k Retirement Account with company match contributions
- Free Mental Health services, Life Insurance, Long & Short-Term Disability Insurance
- Flexible Spending Accounts and Health Savings Accounts
- Employee Financial Education
- Employee Educational Expense Reimbursement
- Employee Charitable Donations
- Employee Referral Incentives
- Employee Team Building Activities
- Employee Assistance Program
- Complimentary Food and Snacks

Contact:

Watts Ha

Associate Regional Director

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