

James A Braziel, CFP®
Braziel & Associates, LLC
300 Harding Blvd., Ste. 102 ~ Roseville CA 95678
Respond to: info@theplanners.net
www.theplanners.net

FINANCIAL PLANNER ASSISTANT

BRAZIEL & ASSOCIATES, LLC is an established independent financial planning and investment advisory firm with offices in Roseville and Chico. Our Roseville office is seeking a PLANNER ASSISTANT to support the CFP® Professional. This position offers a unique opportunity to be part of a successful team and to assist in the financial planning process.

- The candidate must have **experience working within the financial services industry** – investments, financial planning, life insurance or estate planning. Tasks will include monitoring investments using our proprietary software and Morningstar Office, preparing financial plans using MoneyGuide Pro, reviewing life insurance illustrations, summarizing key trust document provisions and outlining estate distributions.
- The candidate must have **industry knowledge and research capability** to assist with website updating and the writing of our periodic newsletter and blog.
- The candidate must be an **advanced user in Microsoft Office**. Will build spreadsheets and charts using MS Excel and develop presentations using MS PowerPoint and Publisher.
- The candidate will **embrace a wide range of responsibilities** representative of an independent financial planning firm including working with and maintaining Redtail CRM.
- CFP® Professional or candidate will be strongly considered.
- Series 6, 7 or 65 a strong plus, but not required.

Other Qualifications:

- Strong work ethic
- Dependable and reliable
- Incredible attention to detail
- Takes pride in work performed
- Driven by excellence and is self-motivated

This is a permanent full time position with benefits, including a competitive vacation package and 401k retirement plan. The salary is commensurate with experience.

If you are looking for a challenging position encompassing all aspects in the exciting field of financial planning, we want to hear from you. We invite you to submit your resume along with a cover letter **(Required)** highlighting your financial industry experience to info@theplanners.net.