

Financial Planner – Virtual

Financial Coaches are the eyes and ears of Clever Finance. Without your coaching our customers would be scared and unsure. You blend empathy, compassion and financial prudence to help consumers at all financial levels. Clever Finance brings together technology and humans to help employees with all of life's financial matters. This is not your typical planning session. These are going to be quick wins with consumers that are generally not sophisticated. You can make a huge difference in the lives of our customers.

This is a virtual, hourly, part-time role. You take client calls from the comfort of your home or office so you can work the calls in around your schedule. This is perfect add-on work to add to your day job. This is hourly, you get paid for the time you are scheduled to take calls and for the follow ups. We are a startup and we appreciate your flexibility as we build out this model.

What you will do

- Take clients pre-scheduled calls and help them with any issues that they may have. Generally, these are not wealth management issues. These are along the lines of cashflow, debt management strategies, savings, etc. methodology, beliefs and principles.
- Perform as a subject matter expert to inform product decisions and implementations
- Deliver an outstanding experience to our customers
- Take detailed notes on topics discussed to share back with the product team and our client partners

Who you are

- Empathetic to consumers across all levels of need
- CFP
- Hands on experience performing financial planning across the spectrum of consumers (from those without resources, to the more affluent)
- Entrepreneurial spirit and passion

Clever Finance is on a mission to help tens of millions of US workers improve their financial situation. We accomplish that through smart software, highly personal engagement and human coaches.

To apply, please provide a cover letter and resume. Please include a description of how you have served customers across the spectrum of needs, the hours you could work each week, and your required hourly rate. Send your application to jobs@CleverFinance.io