NEW PLANNER
RECRUITING

Virtual - Work from Home!

Associate Advisor

RECRUITER

Joe Hogan CFP®

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INTERESTED?

Apply here:

https://bit.ly/2Fyrc5h

NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing a fee-only firm in the San Francisco Bay Area that is seeking an Associate Advisor to join their team. This position will work virtually and can live locally or anywhere in the country. Detailed job specifications available once we connect and agree it is a mutual fit.

COLLABORATIVE, CLIENT – FOCUSED RIA

Our client is a fee-only RIA with multiple locations across the San Francisco Bay Area. This established firm works with over 150 clients to develop a clear vision of their life goals using a process of life-centered planning, then support their journey by providing comprehensive and coordinated financial planning advice. This firm has extensive tax expertise that is pervasive throughout their recommendations and is integrated with clients' investment, short-term and long-term financial plans.

RESPONSIBILITIES WE'LL TRUST YOU WITH

Have a full spectrum role in client-advisor meetings owning all aspects of preparation, documentation and follow up. Be a core member of the formal planning team developing financial plans, interacting with clients, and client onboarding. Learn and improve business processes to improve efficiencies. Work together with lead and senior advisors to develop financial plans using various planning and analytical platforms. Research recommendations. Frequent communication with planning team and clients is needed. This is a vital role that directly impacts the client experience. This is not a back-office support role.

QUALIFICATIONS

Bachelors' degree from an accredited university; major in financial planning preferred. You will be responsible for producing foundational financial planning recommendations, therefore must be a CFP® professional or have, at a minimum, passed the exam. Familiarity with MoneyGuidePro, Orion, Redtail, and Finametrica is preferred. Excellent verbal and written communication skills. Organized. Highly flexible and confidential with all matters.

THE PERKS

Competitive salary based on experience. 401(k) retirement plan. Health insurance plan. Open vacation policy plus paid sick leave. Cell phone, mileage, continuing education, and professional certification reimbursement. Opportunity to work from home, while working alongside industry leaders.