New Planner Recruiting, LLC

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Position Title: Associate Financial Planner

Opportunity Location: Rock Island, IL
Opportunity Type: Full-time position

Job Description:
We are an established financial advisory company in Rock Island, IL that is in need of a second professional. We offer a team environment, a reputation for excellence, established clients and growth potential to help you reach your personal goals.

We specialize in investment management and financial planning using a customized approach for high net worth individuals, corporate executives, and small business owners. We are currently seeking a dedicated team player who wants to learn the business from the ground up, and is enthusiastic about helping people strive for financial independence. Our Associate Planner position requires a bright, hard-working, goal-oriented, self-motivated, passionate, personable, and professional individual.

Position Overview:
This is a professional position that will support the firm's owner directly in servicing the existing and potential clients. You will be expected to assist in various projects including portfolio reviews and preparing financial projections using Excel spreadsheets and E-money financial planning software. Thorough computer and technology skills are essential with a particularly strong understanding of Microsoft Excel. The firm owner is available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions. Qualified candidates will be detail oriented, structured and have a high degree of follow through.

Initial Key Areas of Responsibilities:
- Continuously monitor clients' financial situations with detail and accuracy
- All aspects of pre-client meeting activities such as preparation of meeting agendas, client paperwork, Investment Policy statements, asset allocations as well as post-client meeting tasks such as develop meeting notes, perform financial situation analyses, and coordinate planning implementation with outside professionals if necessary
- All aspects of day to day client service such as working with various custodians on client account issues/maintenance, dealing with deposits and withdrawals, new account set up, and account transfers
- Work with the firm owner to prepare plans and retirement projections in Microsoft Excel and E-Money
- Work with the investment company platforms such as Pershing, AXA, American Funds, ING as well as Goldmine CRM and portfolio management Morningstar
- Assist with trading and rebalancing of client investment accounts
- Assist with investment research and computation of returns and benchmarks
- Interact with clients over the phone and in-person with accuracy
- Step in and answer phones when other team members are unavailable
- Help troubleshoot computer software and hardware

Key Qualifications:

- B.S. degree from accredited four year university preferably in business, finance, economics, etc.
- Existing FINRA series 7 & 66 or attainment within 3-6 months after joining firm
- CFP® certification or attainment within 1-2 years after joining firm
- CLU or ChFC designations are a plus
- Strong financial and analytical skills
- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Basic understanding of insurance and estate planning strategies for high net worth clients
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player with a ‘no job is beneath me’ attitude
- Able to work independently
- Organized, with a strong attention to detail
- Able to perform multiple tasks efficiently
- Show confidence when dealing with clients and the firm owner
- Superior knowledge of Microsoft Excel, Word and PowerPoint

Benefits:

- Competitive salary with performance based pay program and career track available
- Company contribution towards health insurance
- 401k/profit sharing plan
- Educational reimbursement (continued education, conference attendance, training budget, etc.)
- Paid professional dues
- Mentorship and Learning Opportunities
- Casual and fun office atmosphere

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*If you are interested in this position, please contact Caleb Brown at cbrown@newplannerrecruiting.com