



<b>Job Title:</b>	<b>Financial Planner</b>
<b>Relevant Work Experience:</b>	<b>5 years+/-</b>
<b>Job Category:</b>	<b>Financial Services</b>
<b>Licenses:</b>	<b>Series 6, 7, 66 and life/health, (CFP, CPA and/or JD - preferred)</b>

### **About us -**

We are a financial planning practice located in Fulton, MD. Our planning process is one of the most robust planning processes in the industry and centered on true objective planning. As a firm we focus on wealth management, asset management, estate preservation planning, business planning, and retirement plan consulting. Our team is cohesive, fast paced and professional. Together, we provide our clients with an extraordinarily high level of service.

### **About the position –**

The ideal candidate will have a college degree in finance, accounting, economics, business administration or a related field; with the demonstrated ability to play an active role in assisting the firm's partners with managing the clients, as well as, business development with firm partners and professional staff. In addition, this person must be organized, professional, show a sense of urgency, possess the skills to motivate clients to take action and have the ability to work independently. We are growth-oriented firm and this role provides the ideal candidate to grow in their career and make a difference with clients.

This position's primary responsibility will be to provide financial planning for the clients of the firm as well as individually developed clients. Business and estate planning experience is crucial for success. To help you succeed, we have an in-depth support team not found elsewhere in the industry. There are an estimated 2 support team members per planner allowing you to focus your time on working with clients and finding new ones.

### **Job responsibilities**

- Assist clients throughout the planning process
- Prepare case analysis
- Prepare meeting / presentation materials
- Assist clients with plan implementation
- Meet with clients for reviews
- Exceed client expectations
- Leverage client relationships through our proven referral process.

### **We offer-**

A salary commensurate with your experience, a bonus based on meeting production goals, a marketing allowance, and a real opportunity for professional development.

In addition, we provide:

- ◆ **Health, Dental & Vision**
- ◆ **401K**
- ◆ **LTD & STD, Life Insurance**
- ◆ **Paid time off (PTO)**