- Asheville, NC - *Financial Planning Associate*
    - For a video position description click here: https://youtu.be/f5hLJ7NR9fo
- Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are a growing fee-only financial planning firm seeking to hire a Financial Planning Associate to help us continue providing our clients premier customer service. The Financial Planning Associate (FPA) will provide technical financial planning and investment management under the guidance and supervision of the firm's senior and lead planners. The ideal candidate will have 2-5 years of professional work experience and embrace a client-centered team approach to the financial planning process.

What you will get to do:

- Participate in all areas of client meeting preparation, including running reports, developing financial plans and making client recommendations
- Partake in client meetings with the firm's planners to build and maintain strong relationships
- Prepare and make recommendations on client investments, including portfolio allocation reports
- Analyze client tax returns and insurance policies and prepare recommendations
- Follow-up with clients and planners on any items discussed during meetings; enter tasks in Client Relationship Management (CRM) system
- Assist planners in researching topics and drafting client email communications
- Support the planners by scheduling and confirming client appointments, and requesting appropriate documents from clients
- Maintain client information in CRM system
- Assist with all non-advisory questions and paperwork, including processing forms and applications for investment accounts and related forms for business transactions
- Track client service issues and new business transactions in progress and report status

What we seek in a candidate:

- Passed CFP® certification examination, candidates working towards CFP® Certification will be considered
- Bachelor's degree from accredited institution
- Series 65 (preferred)
- Strong written and verbal communication skills for client communications
- Skilled user of Microsoft Office; experience with financial planning and tax software is a plus
- Self-starter, able to work independently, willing to learn and take on additional responsibilities
- Expertise with office technology is preferred

Position perks:

- Qualifies for apprenticeship 2-year work experience requirement for CFP® Certification
- Competitive salary, depending on experience and value proposition, and career track available
- 401(K) with match, bonus available based on company revenue, monthly stipend toward health insurance costs