

Fort Worth, TX- *Agency Planning Principal*

For a video position description click here <https://youtu.be/5S4VueNZxUw>

Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are new, growing financial services firm in Fort Worth, TX, providing expertise in financial planning, retirement income planning, tax planning and investments. We are seeking to hire an Agency Planning Principal that has a passion for Financial Planning and understands planning from the client maintenance and compliance aspect.

The Agency Planning Principal (APP) will provide technical financial planning and investment management under the guidance and supervision of the firm's senior planners. The ideal candidate will have a strong desire to embrace a client-centered team approach to the financial planning process.

What you will get to do:

- Participate in many areas of client meeting preparation, including running reports, developing financial plans and models
- Assist firm's producers and advisors in the development of plan presentations and researching client solutions
- Input all action items into tracking system to make sure planning and implementation stays on schedule
- Work with team to complete cash flow analysis and other areas required for financial plan
- Execute quarterly & annual reviews and assist with maintaining client service and experience systems
- Become proficient in processing forms and applications for both insurance and investment accounts, as well as other related forms for business transactions
- Track client service issues and new business transactions in progress and report status

What we seek in a candidate:

- Bachelor's degree from accredited institution
- Committed to obtaining Series 7, 65/66, & 24 within 24 months of joining the firm
- Basic knowledge of building plans for retirement income and portfolios
- Self-motivated, with a strong desire for performance driven compensation and growing earnings potential
- Strong written and verbal communication skills for client communications
- Must demonstrate well above average ability in time management and organizational skills

Position Perks:

- Base stipend, plus commission/profit sharing structure
- Bonus opportunities
- Residual income
- Quality health, dental, & vision benefits
- Group Life Insurance
- Group long-term disability insurance
- 401(k)

- American College Tuition Reimbursement
- Recognition incentives
- Great working environment with professional growth opportunities

*This firm takes holistic approach to financial planning, not just asset management.
Most clients will have both insurance and investment solutions in their portfolios.