Purchase, NY - *Associate Wealth Manager*

For a video position description click here: https://youtu.be/yn3GvU5PZnU

Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are an independent fee-only Wealth Management firm founded in 1993 in Purchase, NY seeking an Associate Wealth Manager to join our team. We provide comprehensive financial planning and investment management services for individuals, families, and small businesses. We use a unique approach to assist clients in discussing meaningful goals and attaining those goals through actions and strategies consistent with their specified values.

We are currently seeking a dynamic team player who wants to be part of a successful team, is enthusiastic about helping people make the most meaningful use of their personal and financial resources, believes in the financial planning process, and is looking for a tremendous career growth opportunity. This position will be involved in the entire client engagement and will be encouraged to grow into a Wealth Manager role, if desired.

What you will get to do:

- Collect, organize, and synthesize personal and financial client information
- Construct financial and retirement projections using Money Tree
- Assist firm owner in analysis of estate plans, retirement plans, tax planning, and insurance needs
- Participate in client meetings and support firm owner in capturing client wishes via meeting notes and delivering follow up planning strategies
- Create deliverables for client engagements
- Continuously monitor clients' financial situations with detail and accuracy with Junxure CRM
- Be available to field ad hoc planning questions from clients
- Conduct research projects on recent developments in the wealth management industry

What we seek in a candidate:

- Demonstrated passion for the Financial Planning profession
- CFP® certification or working towards CFP® certification
- Bachelor's degree from an accredited institution preferably in Financial Planning
- Strong financial, critical thinking and analytical skills
- Strong persuasive and interpersonal skills
- 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
- Show confidence when dealing with clients and the firm owner
- Knowledge of Microsoft Office suite. Experience with Money Tree, Morningstar Office, Junxure and PortfolioCenter are a plus

Position Perks:

- Competitive salary with performance based incentives and career track available

- Health and disability insurance available
- 401K
- Potential educational reimbursement (continued education, conference attendance, training budget, etc.)
- Paid professional dues
- Mentorship and learning opportunities in a fun and casual work environment