San Francisco, CA - *Financial Planning Associate*
Email for a primary contact: candidate@newplannerrecruiting.com

For a video position description click here https://youtu.be/-eTgE4zrT_Y

What we are offering:

The Humphrey's Group is a fee-only investment firm seeking a Financial Planning Associate that will be committed to guiding our clients on a financial path that is in alignment with their goals and values. The Financial Planning Associate will support the President and the Director of Financial Planning in providing effective, high-touch services that reflect both empathy and expertise. This position is an integral part of our team and though primarily involved in wealth management, will also participate in organization and business development activities in addition to client events.

Initially this will primarily be a support role; however, in certain areas the Financial Planning Associate will have greater responsibility. New ideas and innovation will be welcomed and encouraged. We strongly value our culture of continuous learning and as the Financial Planning Associate gains knowledge and skills, the role will expand.

What you will get to do:

- Perform analyses in specific focus areas according to the level of CFP® coursework completed
- Participate in the preparation of materials for client meetings with attention to detail and accuracy
- Assist with investment research and computation of returns using Morningstar Workstation, and place trades as back-up
- Interact with clients over the phone and in person professionally, respectfully and compassionately
- Research and pursue topics relevant to financial planning, synthesize and report on information gathered from publications, conferences, and relevant meetings
- Participate in client events which involve facilitating client discussions about the non-numerical aspects of personal finance
- Track client information and interactions, manage workflow, and generate reports using Junxure CRM
- Research and suggest new financial planning tools as appropriate
- Participate in our work as a team, including attending annual retreat, goal setting (firm and personal), ongoing team lunches and team meetings with outside consultant

What we seek in a candidate:

- Bachelor's degree from an accredited institution
- Demonstrated passion for the profession
- In pursuit of the CFP® designation
- Strong interpersonal, written and communication skills
- Strong financial and analytical skills
- Advanced proficiency with MS Excel

- Must be a self-starter, problem-solver and goal-oriented team player that is self-reflective, with a commitment to continuous learning

Position perks:

- Estimated salary range $60-70k based on education, experience, and credentials; career track available
- Company contribution towards health insurance
- 15% contribution to profit sharing plan
- Professional development budget for CE, conferences and training
- Paid professional dues
- Mentorship and Learning Opportunities