Financial Planning Associate – Bucks County, PA

To apply for this financial planning career position please submit information to candidate@newplannerrecruiting.com or www.newplannerrecruiting.com

What we are offering:

We are an established fee-only financial planning and investment advisory firm located in Bucks County, Pennsylvania that is growing rapidly. We are very interested in you if you are a recent graduate pursuing the CFP®, or have a few years of work experience looking for a better firm culture, career opportunity or overall personal and professional quality of life. Candidates that succeed at our firm are positive, have a sense of urgency, and unwavering integrity. We offer the opportunity to learn from and be mentored by four senior advisors and two support advisors, to learn the business from the ground up, freedom to help shape the future of a boutique firm and eventually work your way up to Partner.

What you will get to do:

Here is an overview of what you would get to do and the problems you would be challenged to solve if you joined our team:

Client Interaction:

- Establish relationships with our existing and new clients
- Monitor and assist with client meeting scheduling and agenda items
- Determine agenda items, update financial plan, goal tracking and mind map software linking all client information
- Attend client meetings from day one and take notes for CRM. Develop client meeting summary letters
- Complete follow-up communication and implementation of actions that result from client meetings
- Participate in various aspects of financial plan implementation
- Join associations, groups, community organizations to give back and represent the firm in the area

Financial Planning Contributions:

- Responsible for creating new plans and making ongoing updates to existing financial plans
- Interact with various Strategic Alliances to ensure that the outside specialists are taking good care of our clients' needs
- Engage in ongoing financial planning education. Read industry journals and present your ideas to team, be active in local and national financial planning groups, and attend seminars and conferences

Operational Support:

- Establishment or execution of new accounts, transfers, deposits/withdrawals, trades, and other items when needed
- Prepare reports and analysis for client service requests and client meetings
- Work on firm-wide projects to improve overall client deliverables and firm efficiency

What we seek in a candidate:

- Sincere commitment to the highest levels of personal integrity
- B.A. or B.S. degree from accredited four-year university and pursuing CFP® Certification
- Proven commitment to the financial planning profession and process
- Must be problem solver who takes initiative and demonstrates ownership of one's work product
- Possess a "no task is beneath my pay grade" attitude
- Show curiosity and confidence when dealing with clients and principals
- Specific experience working with MoneyGuidePro, Redtail, Assetbook, are and Fidelity and Schwab Institutional Custodian Platforms are helpful, but not required

Position perks:

- Base salary commensurate with experience plus incentive bonus plan
- 401k plan with safe harbor matching employer contribution
- Employer sponsored health insurance, dental insurance, and long-term disability insurance
- Reimbursement for CFP® exam prep course and CFP® Exam fee, if not yet taken
- Annual NAPFA membership
- Education and conference allowance