



As a Financial Planning Associate, you will play an integral role on our collaborative Financial Planning Team. While working hand in hand with our Financial Planners, you will evaluate a broad range of data and information to prepare financial reports and projections that are key to providing unbiased and objective advice and recommendations to our clients. You will also play an important role in communicating with our clients and helping them to implement our recommendations while providing the best possible client experience.

This is a unique opportunity for a detail oriented and analytical individual to jump in and learn all aspects of the financial planning process. We are actively seeking motivated and disciplined individuals to join our core team. Stepp & Rothwell has a clearly defined career path to help you achieve your goals, which includes a Partnership track for those willing to go above and beyond to serve our clients. We require that all Financial Planning Associates earn the CFP designation within two years.

Company Description

Stepp & Rothwell is the premier “fee-only” financial planning and investment advisory firm in the Kansas City area. Our team of financial professionals provides unbiased, results-oriented advice, which offers our clients the knowledge they need to make informed decisions about their future. Because we believe issues like financial independence, estate planning, tax planning, cash flow management, risk management, education planning, and wealth accumulation and preservation are completely interrelated, we develop client-specific strategies that encompass them all. We make differences in our clients’ lives every day by helping them make the very best choices about the parts of their lives that matter the most: their children’s education and support, their careers, their financial independence, their giving plans, and their ultimate legacy.

At Stepp & Rothwell, we value our employees as much as we value our clients. We recognize that each person has a unique background with different educational experiences, skills, and aptitudes. We build our business on that diversity by capitalizing on your strengths. Because we promote from within, we place a high value on personal and professional growth through external education and internal coaching and mentorship. We provide a supportive, intellectually challenging, family atmosphere in which to learn to become a real comprehensive financial advisor, not a glorified salesperson. Our compensation and benefits packages are competitive and include health and dental insurance, a generous retirement plan, and reimbursement for professional education.

To apply, please submit a resume, cover letter and transcript to:
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