KEATING

At KEATING, each individual has a unique ability, a unique story, and a unique contribution that is vital to our success. With diverse experiences, cultures, backgrounds, and beliefs we are a better company, and we better serve our valued clients. True teamwork is only possible when we embrace that our differences make us better together. By creating an environment where people are welcomed and equipped to do their best, we fully embrace our core values of excellence, abundance mindset and teamwork.

What KEATING can offer you

- Professional Development
- 8 paid holidays
- 401(k) with company match
- Birthday is a Paid Day Off
- Employer-Paid Disability, Life Insurance, and Employee Assistance Program
- Health, Vision, and Dental Plans
- Dependent Care and Flexible Spending Accounts
- 3 weeks Paid Time Off
- Lunch and Learns & All Company Weekend

Learn more about us at http://www.keatinginc.com/about-us/our-values

Associate Financial Planner

Job Summary

The **Associate Financial Planner** provides our top financial advisor teams and their clients with financial planning administration services. This is a client facing, non-sales position with growth potential in areas that align with the advisor team needs and your areas of interest. You will provide research, data entry, analysis, and client communication support to your financial advisor team and participate in the presentation of financial plans during client reviews. This position is based in our Overland Park office and will be eligible for a hybrid remote option once onboarding is completed, with minimal travel expected. This position reports to the Financial Planning Administration Manager.

Responsibilities include, but are not limited to:

1. Financial planning related research
2. Account aggregation support & client financial planning site updates
3. Planning-related client casework and communication with clients and coworkers
4. Creating & updating financial plans and scenarios through gathering and analyzing client data and proposing solutions alongside the financial advisors
5. Client meeting preparation and follow up casework completion and delegation
6. Provide seamless interaction in client meetings, assisting the advisor through providing financial plans, performance reports, and other requested materials during meetings
7. Client meeting notes taken and filed

8. Maintain professional & industry continuing education
9. Coordinates with our clients' team of attorneys, CPA's, and other representatives to accomplish client goals
10. Other areas of expertise as applicable to advisor team needs & planner unique abilities (i.e. estate planning, retirement planning)
11. Other duties as assigned

Desired skills include, but are not limited to:

- Minimum of 1 year of financial planning experience required
- Knowledge of financial planning software preferred
- Proficient in Office 365 apps and adaptable to new technology
- Excellent communication skills: written, interpersonal, and virtual
- Strong analytical, research, organizational & time management skills
- Comfortable with remote client and team interaction
- Thrives in a fast-paced environment
- Excellent problem-solving skills
- Collaborative
- Service-oriented and responsive to client and advisor needs

To apply please use the following link: https://keatinginc.applytojob.com/apply/PQxqxWUCqn/Associate-Financial-Planner?source=GreaterKCFPA