Financial Planner

Job Description

Work Schedule: Monday through Friday 8:00 a.m. to 5:00 p.m.
Reporting Structure: Associate Director of Financial Planning
Location: Lawrence, KS

Organization:
The Trust Company has been in business for 30 years and provides financial advisory, investment and fiduciary management services for approximately 1,300 individuals and business clients and has approximately $1.6 billion in Assets Under Management. The Trust Company provides expertise in the following accounts: discretionary investment management accounts, estate and trust accounts, retirement plans, IRAs, 401(k), profit sharing and charitable foundations.

Major Duties:
- This position would be the dedicated Financial Planner for the Lawrence, KS office, as well as our Columbia, MO office. While the position would office out of Lawrence primarily, travel to Columbia would be expected one to two times per month.
- Provides support for clients by gathering data, developing financial plan analysis and scenarios, preparing plan updates, packaging and posting meeting materials, and managing meeting notes and action items.
- Attends and participates in client meetings, including prospect meetings, the presentation of the client's financial plan and associated recommendations.
- Works with allied professionals on the client's behalf as necessary to develop and update financial plans as well as fulfill client requests.
- Executes client action items and exhibits timely communication with clients to provide excellent client service.
- Develops financial review templates and meeting tools.
- Assists in business development and sales, which may include attending events and participating in community, civic or charitable organizations.
- Involvement in projects and research at the discretion of the Associate Director and the Director of Financial Planning.
- Other duties as assigned.

Qualifications:
- Bachelor's degree in a related field is required.
- Certified Financial Planner™ professional or commitment demonstrated to earning designation within 3 years.
- Experience with MoneyGuidePro, BNA Income Tax Planner and/or other planning software is preferred.
- Strong written and verbal communication and grammatical skills.
- Highly proficient technical skills with the ability to analyze quantitative and qualitative information.
- Ability to work both independently and in team settings to show flexibility and versatility.
- Ability to manage a variety of tasks and prioritize individual workload responsibilities.
- Ability to effectively present information in various formats such as one-on-one, small groups or larger seminars.
- Ability to make effective decisions using impeccable ethical judgement.

Physical Demands:
- Ability to sit for extended periods of time.

- Ability to read computer screens, mail, e-mail and talk on the phone.
- Ability to unpack and move supplies up to twenty-five (25) pounds.
- Valid driver's license and ability to drive an automobile.
- Ability to travel as directed by position requirements.

Additional Duties:
Additional duties and responsibilities may be added to this job description at any time. The job description does not state or imply that these are the only activities to be performed by the employee(s) holding this position. Employees are required to follow any other job-related instructions and to perform any other job-related responsibilities as requested by their supervisor.

Ways The Trust Company Supports Employees:
- Competitive salary commensurate with experience and opportunities for bonuses
- Company paid educational opportunities
- 401(k) plan with company match
- Sick and vacation leave
- Wellness benefits
- Health insurance
- Opportunity for company ownership

To apply for this position, please submit a cover letter and resume to Mackenzie Blakeslee, Associate Director of Financial Planning, at mackenzieb@thetrustco.com.