Financial Planning Associate – San Francisco, CA

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

For a video position description [click here]()

What we are offering:

We are seeking a Financial Planning Associate to join our independent, Wealth Management firm located in San Francisco, CA and become a part of our team of hard-working, dedicated and fun individuals. We are very interested in you if you're a dynamic team player who wants to be part of a successful growing group, is enthusiastic about helping people make the most meaningful use of their personal and financial resources, and is looking for a tremendous career growth opportunity.

This is a professional position that will assist our Senior Planners in the creation of complex and comprehensive financial projections for our clientele. The Financial Planning Associate will be involved in the entire client engagement and will be encouraged to grow into the Senior Planner role, if desired. The Senior Planners are available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions.

What you will get to do:

- Participate in all areas of client meeting preparation, including running reports, developing financial plans and making client recommendations
- Prepare and make recommendations on client investments, including portfolio allocation reports
- Follow-up with clients and planners on any items discussed during meetings; enter tasks in Client Relationship Management (CRM) system
- Assist planners in researching topics and drafting client email communications
- Support the planners by scheduling and confirming client appointments, and requesting appropriate documents from clients
- Assist with all non-advisory questions and paperwork, including processing forms and applications for investment accounts and related forms for business transactions
- Track client service issues and new business transactions in progress and report status

What we seek in a candidate:

- Demonstrated passion for the Financial Planning profession
- Pursuing CFP® certification
- Bachelor's degree from an accredited institution, preferably in Financial Planning
- Strong financial and analytical skills
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player with a 'no job is beneath me' attitude
- Show confidence when dealing with clients and the Senior Planners
- Ability to write clearly and concisely

- Knowledge of Microsoft Office Suite and experience with eMoney, PreciseFP, Orion, Wealthbox, Box.com and DocuSign is a plus

Position perks:

- Competitive salary
- Employer-sponsored medical insurance, plus $6,000 stipend to help cover any additional costs.
- Employer-paid dental, vision, life, & disability insurance
- 401k and Roth 401k, with safe-harbor contributions
- Semi-annual bonus, based on personal and firm performance
- Sponsorship towards Series 65
- Sponsorship towards CFP designation (prep courses and exam)
- Career-track available
- Paid vacation and holidays
- Great location, corner of Market and Montgomery in the center of downtown SF