

## Financial Planner

Polaris Greystone Financial Group, LLC is an independently owned, federally registered investment adviser. We are a fee-only adviser and do not charge commissions for buying or selling stocks or bonds. Our services include: tactical portfolio management, private wealth management and financial planning provided with unparalleled individual attention focused on developing a long-term, successful relationship.

We are seeking a **Financial Planner** to assist the wealth advisors in reviewing, analyzing, and preparing financial plans for prospects and clients. The position creates comprehensive financial plans for prospects and clients using financial planning software, and identifies holdings in clients' 401(k) plans that align with the clients' asset allocation at Polaris Greystone.

Responsibilities include:

- Preparing financial analyses for clients, including retirement analysis, estate-planning analysis, education-funding analysis, stock options analysis and risk management needs analysis.
- Making recommendations to the advisors about financial planning solutions that will fit each client's unique circumstance.
- Under the direction of the advisors, preparing alternative proposals (what if options) for the client.
- Preparing charts, graphs, tables and other visual aids to be used in meetings with prospects.
- Identifying investments in clients' 401(k) plans that align with the clients' asset allocation at Polaris.
- Assisting the Director of Wealth Management with client appreciation event planning and logistics.
- Maintaining the database for client professionals and referral network.

Required Education, Experience & Skills

- Bachelor's Degree.
- Series 65 preferred.
- At least 1 year in financial services, preferably financial planning.
- Experience with financial planning software.
- Competent computing skills that include working with the Microsoft Office suite.
- Attention to detail; strong organizational skills and the ability to complete work in a timely, accurate and thorough manner.

We offer a comprehensive benefits package that includes medical insurance, paid time off, and a generous 401(k) plan. We offer you a dynamic working environment, a culture

of mutual respect, commitment to maintaining the highest ethical standards, and the opportunity to play a vital role in the growth of our firm.

Interested candidates should complete an application and email a cover letter and resume. The application can be found at <http://www.polarisgreystone.com/careers/>