



NEW PLANNER RECRUITING

Associate Financial Advisor – Greensboro, NC

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

What we are offering:

As one of the only fee-only firms in Greensboro, we believe that everyone deserves objective, commission-free advice without conflicts of interests. We are a successful, growing firm managing over \$500 million in assets. Our firm uses a unique life planning approach to help clients create the future they want for themselves and their families. Join a firm ranked by Financial Times as Top 300 firms in the nation for two years in a row; Barron's as one of America's Top 1200 Financial Advisors; 7th in the state of North Carolina, and one of the Top Ten Financial Advisors in Greensboro, Chapel Hill and Winston-Salem, NC by Advisory HQ.

We are seeking an Associate Financial Advisor to join our team. This individual will work directly with clients and prospects through supporting Lead Advisors and provide direction to Client Service Associates. The Associate Financial Advisor will have the opportunity to transition to a Lead Advisor over time.

What you will get to do:

- Provide analysis for client review meetings around allocation, MoneyGuide Pro, cash needs, etc.
- Get to know all details of clients' financial life including balance sheet, income sources, company benefits, etc.
- Create trade recommendations and present to Lead Advisor. Communicate recommendations with clients
- Work with Lead Advisor to create financial planning strategies for clients – insurance needs, estate planning, deferred comp, etc.
- Communicate with clients' key professional advisors – mortgage broker, attorney, CPA, etc.
- Participate in 50% - 100% of client presentations depending on meeting requirements

What we seek in a candidate:

- Bachelor's degree from an accredited institution
- 0-3 years of experience in Financial Planning
- CFP® designation, or CFP® certification in process preferred

Position perks:

- 401K – Participation on 1st day of quarter following date of hire. Company matching after 1st year.
- Employee Bonus – Individual bonus eligible after 1st year.
- Profit Sharing Plan – Profit sharing after 1st year
- Medical Insurance – 70% covered for employee.
- Dental & Vision – Available, but employee covers.

- Paid Annual Leave – After 1st year employee receives 15 days off per year.