Financial Planner – Charlotte, NC

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

What our client is offering:

Named one of the Largest Local Financial Planning Firms by the Charlotte Business Journal and one of the Top 200 Largest RIA Firms in the Country by Financial Advisor Magazine, our fee-based firm manages over $1 billion in AUM. We offer investment management and financial, tax and estate planning to approximately 300 families in the Charlotte region. Described as a “small company with a big heart” by the Charlotte Observer, our firm has a long tradition of contributing our time and money to make the community better. Each member of our team offers a unique expertise in their specialty developed through years of practical experience and formal education. Collectively, our team has 12 advanced degrees or designations.

We are seeking a Financial Planner to join our growing team. This is an ideal position for an experienced financial planner who has a strong understanding of financial planning principles. The FP will prepare for client meetings, follow up with clients after meetings, and proactively plan for clients.

What you will get to do:

- Prepare for client meetings including drafting agendas, confirming agenda with clients, updating client information, reviewing all aspects of planning and what may need to be addressed next
- Attend client meetings to gain a better understanding of their philosophy and to help provide better follow up.
- Work with Client Advisors and Client Service Advisors to complete follow up for client meetings
- Prepare cash flow and retirement analysis, review client activity and history, summarize estate documents, prepare estate flow charts, consider asset allocation, income tax planning, insurance coverage, Medicare and social security planning
- Research and respond to client questions
- Various ad-hoc projects to improve firm efficiency, streamline client information, and proactively approach planning with our clients.

What our client seeks in a candidate:

- Bachelor’s degree from an accredited institution
- CFP® designation
- 3+ years of financial planning experience
- Above average knowledge of Excel
- Exceptional communication skills

<u>Position perks:</u>

- Generous paid time off policy to include 16 days in your first full calendar year of employment (15 paid time off days plus a birthday holiday). Newly hired employees are allowed vacation days in their first year based upon the percentage of the year they are employed at firm.
- Paid employee health insurance premiums for single coverage for a high deductible health insurance plan with an HSA account. Firm contributes towards the employee's HSA account on a yearly basis.
- Long term disability insurance
- Group term life insurance
- 401(k) profit sharing plans including employer contributions of up to 10% of your income, subject to IRS limits.
- Maternity leave of eight weeks after one year of service, twelve weeks after three plus years of service.
- Flexible spending account for dependent care expenses and medical expenses not covered under the health insurance plan.
- Education assistance to gain credentials to further your career at our firm.
- Paid salary during active jury duty.