Financial Planner

Full Job Description

Are you looking for a firm culture that embraces technology, a start-up/emerging growth-like culture, and actively serves clients around the country? An innovative and growing firm in Las Vegas, NV, is looking for a Financial Planner to help them continue to deliver exceptional client service and build upon their transitional wealth planning services.

We are seeking a creative and tech-savvy person who has a passion for detail, is a self-starter, and loves the satisfaction of checking off a list. The ideal candidate is looking to grow a career in financial planning and work in a dynamic team environment.

The AmeriFlex Group – Financial Planner

Job Title: Financial Planner

Revision Date: March 23, 2023

Department(s): Advisory / Financial Planning

Status: Full-Time

Reports To: Director of Financial Planning

Position Highlights:

This individual will work with our lead financial planners, providing financial planning and investment advisory support. Key responsibilities include preparing financial plans and coordinating client service needs with team members. Organization skills and attention to detail are critical given the nature of data entry, processes, and related work, upon which both clients and the team depend.

Specific Areas of Focus Include:

- Providing support for processing client service needs.
- Assisting with creating and implementing workflows and procedures to improve efficiency and enhance the client experience.
- Schedule and prepare agenda for review meetings, as well as Client Experience strategy meetings
- Evaluate client submitted financial planning update materials (i.e., insurance statements, benefits statements, expense reports, earnings, mortgage information, etc.) for correctness and completion
- Enter data in financial planning software
- Update planning software account balances quarterly

Additional Comments:

Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time.

Qualifications:

- Experience in financial services required.
- Experience with eMoney required.

o Some experience in financial planning programs (i.e., CFP® and/or RICP®) is desired.

- B.A. or B.S. degree
- Strong analytical skills
- Excellent written and verbal communication skills
- Self-starter, productive, works well with a team and independently
- Excellent project management skills with the ability to prioritize and track multiple tasks
- Proficiency in Microsoft Office Suite and Customer Relationship Management Software preferred
- Impeccable ability to maintain confidentiality and integrity

Perks:

- Competitive compensation and benefits
- Reimbursement of approved professional development expenses
- Customized career development process
- Comprehensive benefits package Benefit Conditions: Waiting period may apply

Work Location: Office preferred

Paid Training: Yes

Management: Mid-Level

Typical start time: 8:30 AM PST

Typical end time: 5 PM

Job Type: Full-time

Schedule: 8-hour shift

Pay: $75,000.00 - $100,000.00 per year

Benefits:

- 401(k)
- Health insurance

Schedule:

- 8 hour shift
- Monday to Friday

Application Question(s):

- eMoney Experience Required

Experience:

- Financial planning: 1 year (Required)

License/Certification:

- FINRA License (Required)
- CFP (Preferred)

Work Location: In person