



Caleb Brown
Recruiter

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San Francisco Bay Area, California

Financial Planning Resident Associate



NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing a fee-only RIA in the San Francisco Bay Area that is seeking a Resident Associate to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



\$500M+ AUM, TEAM OF 12, FEE-ONLY RIA

Our client is a premier financial planning firm in Northern California. They live to inspire clients and staff to discover what's possible and most important to them, educate on how to best reach their goals, and guide them on the path towards realizing their dream. This is a great opportunity to work directly with advisors and clients – preparing financial plans and plan updates, and working in all aspects of financial planning, from the discovery process to implementation and ongoing support. This is a 36-month program for the right candidate to jumpstart their career as a part of a dynamic team.



RESPONSIBILITIES WE'LL TRUST YOU WITH

Meet and work directly with the firm's clients in support of the firm's Advisors and other Resident's in all aspects of the planning process. Including taking meeting notes, working with Money Tree financial planning software to create and update financial plans, observe and participate in client meetings. Assist with investment management functions of the firm. Complete financial planning and investment management research and ad-hoc projects. Complete client service and operational tasks as necessary. Become an engaged participant at the firm's quarterly staff meetings and retreats.

QUALIFICATIONS



Bachelor's degree from an accredited university; major in financial planning preferred. Adventurous, trustworthy, ethical, hard-working, and professional. Demonstrate excellent written, verbal, and technical skills. Be detail-oriented and able to manage tasks and projects to their successful completion. Enjoy working as part of a team and able to work effectively on their own.



THE PERKS

Competitive salary starting at \$65k+. 401(k) with company match. Full array of benefits (medical, short and long-term disability, life, wellness, etc.) CFP® Exam registration and preparation costs (if applicable). 4 weeks PTO. FPA membership. Hybrid work option after 6 months.