

Financial Planner

At Briaud Financial Advisors, we pride ourselves on our culture of continuous growth, integrity, teamwork, and service. We are seeking a Financial Planner who wants to add to that culture and provide excellent financial planning to take care of clients' needs.

This role is ideal for an individual seeking to become a lead advisor, managing client relationships.

In this role you will:

- Provide objective, unbiased financial advice to a diverse mix of clients by evaluating financial planning opportunities as well as addressing general client financial needs
- Develop and deepen relationships with clients through regular client contact and meetings
- Contribute to the development, presentation, and implementation of financial plans
- Develop retirement projections, income tax projections and estimates, risk management analyses, and estate plans with subsequent recommendations

If you have the following, we want to talk to you:

- **Passion for financial planning and helping clients** — You're committed to helping people on a personal level and you're in this industry to do that.
- **Ownership and initiative** — You can be counted on to follow through on commitments and take on new challenges.
- **Superior conceptual and problem-solving skills** — Solutions come naturally to you and you aren't afraid to think outside the box or look for unconventional answers. And if you don't know the answer, you go and find it.
- **Excellent communication skills** — You keep others in the loop on what's going on and are proactive in updating those you work with.
- **Humble spirit** — You know the areas you need to grow in professionally and you embrace constructive criticism to help get you where you want to be. You strive each day to be a little bit better than before.
- **Demonstrated excellence** — You have excelled in academia, athletics, or maybe you are just really nerdy about a particular hobby. Whatever the area may be, you excel in it.

Required Qualifications:

- CERTIFIED FINANCIAL PLANNER™ designation or Equivalent (CFA, CPA, JD, etc.)
- Bachelor's degree, preferably in business, finance, accounting, economics, or related field
- 5+ years of experience in investment management and/or financial advisory services with demonstrated ability to develop and manage financial plans and manage client relationships.
- Proficiency in Microsoft Office; experience with various financial planning, CRM, portfolio management and document management software.

Briaud Benefits Include:

- 3 weeks paid time off & 15+ paid company holidays
- Flex Time
- 401(k) with employer matching
- Continuing Education – paid professional dues, conference attendance, and training

\$70,000 - \$110,000 Salary is commensurate with experience and qualifications.

Please submit both a cover letter and resume to jobs@briaud.com for consideration.

About Briaud:

"Briaud delivers financial security to some of the smartest people in the world."

What started as a passionate interest has grown into arguably the best Fee-Only Financial Planning firm in the country. Briaud Financial Advisors specializes in working with university professionals and their families providing holistic financial planning experience. Described within the industry as a "white glove service", Briaud utilizes a deep bench of expertise, leveraging decades of experience to help clients meet their long-term financial goals.

Briaud is a lower volatility-seeking firm with an emphasis on steady returns. Advising just under \$700M in assets, Briaud executes a Top-down Macro-driven investment process to manage the portfolios under advisement. Investments utilized with this process include ETF'S, Mutual Funds, and individual Fixed-Income securities.