



COIGN CAPITAL

A D V I S O R S

Coign Capital is a registered independent advisory firm (RIA) based in Draper, UT. We believe wealth management goes far beyond investment consulting or asset management. We recognize the importance of investment performance and strive to apply professional experience and discipline to the wealth management process. Our primary objective is to understand our client's goals and bring business discipline to their personal wealth decisions.

Position: Financial Planning Assistant

Hours: 20-25 Hours per week

Pay: \$16-17/hr.

Location: 12012 S. 700 E. Draper, UT 84020

Responsibilities:

- **Planning**
 - Creating and updating client financial statements and plans
 - Retirement planning, modeling and illustrating
 - Gather and prepare client tax data and documentation
 - Gather and review client estate documents
 - Data entry
- **Investment**
 - Monitor client investment performance
 - Investment model upkeep
 - Investment tasks as needed
- **Administrative**
 - Interact with clients regularly regarding questions or concerns
 - Other administrative tasks as needed

Qualifications:

- Pursuing an bachelor's degree in finance, economics or financial planning
- Sophomore or early Junior
- Proficient in Word and Excel
- Excellent writing skills
- Strong desire for a career in the private wealth management industry

Please apply by emailing Daniel Zundel (at dan@coigncapital.com) with your cover letter and resume.