

Financial Planner

Freestone is an independent wealth advisor to select individual clients, high net worth families and institutions with offices in Seattle, Washington, Oregon, and California. We provide a personalized experience combining rational, intelligent advice and sophisticated investment strategies. To learn more about Freestone, please visit our website at www.freestonecapital.com.

Freestone is searching for qualified candidates to join our Team in a Director level role as a Financial Planner. Successful candidates for this position will have a demonstrated track record of excelling educationally and professionally and effectively supporting the financial planning needs of high net worth clients.

Job Responsibilities

- Develop and deliver detailed financial plans for current and potential clients
- Coordinate with outside vendors to understand and deliver optimized client solutions spanning insurance, retirement, tax and estate planning concerns
- Prioritize and communicate demand queue across the full set of Freestone Client Advisors
- Analyze complex one-off client issues including stock awards, employee benefit plans, Social Security/Medicare concerns, debt analysis and any other issues of personal finance for high net worth individuals and families
- Contribute timely and topical planning articles to be used in Freestone's quarterly newsletter and blog
- This role will *not* have direct responsibility for new client prospecting and/or overall client relationship management

Experience

- Bachelor's Degree or higher
- CFP designation
- Minimum 3 years in a financial planning role with demonstrated ability to effectively interpret and communicate client goals and limitations
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook
- Ideal: Experience on Cheshire and/or MoneyGuidePro
- Wealth management acumen, judgment, and experience
- Highly detail oriented and able to effectively manage and communicate priorities across a large user base
- Excellent communication, listening, and relationship building skills

To apply, please send your resume to:

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