Financial Planning Associate Job Description

Bellevue, WA based fee-only RIA is looking for a Financial Planning Associate to join our team. We offer a flexible work schedule, interesting clients, dynamic teammates, and a unique business model (www.finpath.com).

Role Description

Support the firm's financial advisors by:

- Prepare financial planning reports
- Prepare and review Investment reports in Excel and Morningstar
- Draft portfolio rebalancing proposals
- Create new investment portfolios
- Attend prospect and client meetings and take notes
- Enter data in financial planning software

The successful candidate will be an hourly / independent contractor primarily working from home utilizing email, phone calls and teleconference software. In-person meeting attendance may be required in the Seattle and Eastside areas.

Requirements

- Currently enrolled in CFP® coursework or recently passed the CFP® exam
- Highly organized
- Excellent customer service
- Exceptional attention to detail
- Able to work both independently and collaborate within in a team environment
- Technology savvy and a PC user, familiar with Excel, Word, Morningstar (bonus), any financial planning software (bonus), Outlook, Dropbox, etc.
- Excellent verbal and written skills
- Self-starter and able to follow processes without much supervision
- Happy to help out when needed; open to additional responsibilities when needed
- Curious to learn new skills
- Lives in the Seattle, WA area and is eligible to work in the United States
- Reliable transportation
- Able to work during business hours; some work may be done during off-hours
- A fast, secure, reliable internet connection is a mandatory requirement
- Must be able to pass a credit and background check
- Knowledge of the Financial Services Industry and/or Investments desired

We do not pay relocation fees or expenses.

Contact Information: Please send letter of interest stating why you are the ideal candidate for this role and a supporting resume or summary of work experience to crmosley@finpath.com .