Anew Recruiting
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Anew Recruiting, a specialized search and placement firm, is seeking a Financial Planner for a successful Retirement Planning and Wealth Management firm in Westminster. This is an exciting, active company to work for. They are big on social activity for their current and perspective clients and host activities like golf tournaments, happy hours, camping trips, gun range outings, and other like events, some on a weekly basis. The company is growing and looking for more talent to bring on board.

Job Description

The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

Summary

The financial planner provides sales support to advisors. Duties include research, clerical, and project based work. The research and planning specialist projects a professional company image through in-person, electronic and phone interaction with clients and vendors alike.

Duties and Responsibilities:

- Communicates with Financial Advisors to attain necessary information for plan preparation and development and helps identify business opportunities.
- Researches and gathers all needed information and inputs data for financial plan reviews presented by the financial advisors.
- Researches and gathers all needed information for client meeting reviews; including but not limited to performance reports, call notes, 401(k) recommendations, Morningstar allocation reports.
- Facilitating trades and reallocation of investments as directed by the advisor and investment committee.
- Answers incoming client calls about general account questions.
- Works to accomplish all activities required to meet plan preparation deadlines.
- Follows all applicable rules and regulations as dictated by our various governing organizations.
- Helps research and design investment portfolios for the various financial products.
- Additional duties as assigned.

Education and Knowledge Requirements:

- Substantial work experience required in a financial advisory/sales and/or financial plan creation role.
- In-depth experience with financial planning and investment planning software applications and with customized Excel modeling.
- Solid knowledge and successful proven application of all aspects of a client's wealth management, including investments, insurance, tax, education planning, retirement planning, and estate planning/wealth-transfer strategies.
- Strong presentation and public speaking skills.
- Bachelor's degree required.
- FINRA Series 7 and 66, life and health licenses required.

- Certified Financial Planner (CFP) license or equivalent advanced professional credential required or substantial work experience in the financial planning field.

Behaviors and Traits Required:

- Solid interpersonal, coaching, and partnership skills are a must. Successful candidate must be highly effective and comfortable in social initiating, and being receptive, open, and approachable.
- Assertiveness, persuasiveness, and the ability to coach and positively influence behavior are essential in this position.

Compensation/Benefits:

- Start with 40 hours PTO, accruing an additional 4 hours every 2 weeks
- Company covers individual's health insurance 100% with access to add dental, vision, and family members to all plans
- 401k match program
- 5% bonus, paid quarterly
- Compensation DOE
- Work 7:30-5:30 M-T, 8-12 Fri

Supervisory Responsibilities:

This position has no supervisory responsibilities. However, this position does provide guidance to staff members and coordination with outside vendors.

Other Information:

Regular and predictable attendance is required. Willingness and ability to work non-standard business hours, such as nights and weekends on an as needed basis. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

To Apply

Submit your resume here

At **Anew Recruiting** we recognize the unique dynamic in matching a candidate to a company. We devote our time to identifying our client's needs and matching them with our candidate's goals. We know what works: gathering the facts, managing the process and delivering results.