**Logo, company name

Description automatically generated**

**Junior Partner/Client Solutions Specialist**

The role of the Junior Partner/Client Solutions Specialist will be to interface between the Advanced Planning Advisor, the client, and the back office.  The JP/CSS will primarily focus on running financial plans, vetting product recommendations to ensure fiduciary due diligence, and executing implementation of recommendations.  Familiarity with the financial services industry is highly recommended and Series 7 licensing is preferred or expected within 90 days of hire.  Individual must be technologically savvy, creative, organized and empathetic towards clients.  This is a long-term career position inside of a tremendous organization with opportunity for growth and advancement.

$50,000 base with quarterly bonus

Health insurance and benefits offered

401k w significant company match

Very flexible time off

Virtual options after year 1

Camaraderie & Collaboration

30+ catered meals per year during training and development events