THE GENWEALTH GROUP

Job Description

Title: Associate Financial Planner

Summary of the Position:

Registered Investment Advisory firm (Maplewood, NJ) seeks talented professional to serve as Associate Financial Planner. Working closely with a team of Senior Financial Planners, the Associate Financial Planner will perform a wide range of duties including: retirement modeling, insurance analysis, educational modeling, reviews of estate plan documents, reviews of tax situation and other financial planning topics. Ideal candidate will also have knowledge of benefit programs including Social Security and Medicare. The Associate Financial Planner role is internally focused to support the practice and does not involve production or commission sales.

Required Certifications:
- CFP® Designation (or actively pursuing)
- NJ Life and Health Insurance licensed (preferred)

Required Skills:
- 1-3+ years in financial services industry
- Excellent computer skills including Microsoft Office Suite and CRM systems
- Experience utilizing financial planning software
- Strong analytical/data gathering skills
- Highly dynamic; with professional demeanor accustomed to working with sophisticated clients
- Superior compliance record
- Passion for delivering superior client service and high attention to detail
- Ability to multi-task in fast paced environment with high degree of accuracy
- Comfortable working in a small, relationship-oriented practice

Duties:
- Ideal candidate will work within our defined system where client contact is made on a scheduled, proactive basis
- Support Senior Financial Planners by preparing investment performance/allocation reports, investment policy statements and spreadsheets using a variety of software applications (ie: Black Diamond, Excel, Morningstar, etc.)
- Coordinate client presentations ensuring research and data gathering is complete and timely
- Create customized client retirement projections utilizing financial planning software (RetireUp)
- Consult with clients on benefit analysis related to Social Security and Medicare
- Consult with clients on life, disability and long-term care insurance; review existing policies and recommend new/additional coverage as appropriate
- Serve as lead advisor to clients on ancillary planning issues (mortgage refinancing, leasing, etc)
- Process trades and monitor the firm's proprietary investment models
- Maintain detailed notes and tasks in firm's CRM system (Junxure)

Compensation:
- Competitive salary and bonus
- Company sponsored profit sharing plan
- Health and Dental Benefits
- Paid Vacation