

Financial Planning Associate

Flexible: Part Time/Full Time, Temporary/Permanent position
Odyssey Personal Financial Advisors; Roswell, GA (odysseypfa.com)

Please email your resume and cover letter to steve.siders@odysseypfa.com. Include your preferred position type (Part Time/Full Time, Temporary/Permanent) and salary requirements.

Odyssey Personal Financial Advisors is an independent financial planning firm recognized for its reputation of excellence. We offer comprehensive financial planning, investment management, and ongoing personal financial advice while providing our clients with financial wellbeing. Located in Roswell since 1984, our firm delivers tremendous value and stewardship for our affluent clients throughout metro Atlanta and across the nation. Our clients appreciate an enduring relationship built on honesty and integrity, quality advice, and exceptional service.

Description of Position

Odyssey is seeking a qualified candidate that is interested in learning to coordinate and independently execute all advice-related activities within our wealth management process – analysis, preparation, presentation, follow-up, and client communications. Various special projects may be assigned from time to time. Our firm operates with a client-centered team approach. A self-driven, team player is a must.

The candidate must also have:

- 1) Natural interest and curiosity to help people with their financial needs.
- 2) Personality that supports kindness, team work, and proactive thoughts.
- 3) Strong ability to analyze numbers and communicate the results effectively.
- 4) Time management skills to set priorities, complete multiple tasks and meet deadlines.
- 5) Working knowledge of computers, Microsoft Office, and ideally some industry apps.

There are no production requirements in this role, but a career path is available to work towards this opportunity if appropriate motivation and people skills exist.

Qualifications

- B.S. in Finance or Financial Planning and/or 6-24 months relevant work experience.
- Be able to perceive relevant client needs and concerns, exercise sound judgment, and act professionally. Strong organizational skills, detail-oriented, and a thirst for knowledge to learn new concepts and applications quickly while also having excellent written and verbal communication skills with people of all types.
- Licensing requirement is to be determined; CFP® designation required for future career advancement.

Compensation

- Compensation is commensurate to position type, career experience and proven ability.
- Benefits available for full time, permanent position.

