THE ADVOCATE GROUP

Position Description

Title: Financial Planner

Reports to: Financial Planning Manager

Benefits: Yes

Location: Minnetonka, MN

Status: Full time

About The Advocate Group

The Advocate Group provides financial planning and investment management services. We specialize in navigating the unique financial opportunities and challenges facing executives and their families from some of Minnesota's most prominent companies. Our planning-centric process informs our ability to help coordinate complex cash flow, estate, charitable, tax and investment needs on behalf of our clients.

Job Summary

The Financial Planner will be responsible for providing support to our financial planning team. This role provides client relationship support through gathering, managing and analyzing client data, helps to prepare financial plans and other client deliverables, works with clients to resolve issues and handles other practice management tasks, as needed. The right candidate will have opportunity for growth within the firm.

Responsibilities

- Communicate directly with clients and external client advisors.
- Data gathering, entry, and needs analysis.
- Prepare for client meetings and handle follow-up for clients and team members.
- Build and update client financial models.
- Maintain client contact throughout financial planning experience.
- Maintain accurate and up-to-date client records within the firm's CRM and other data management tools.
- Manage and aid in resolving client service requests.
- Other responsibilities as assigned.

Qualifications

- Bachelor's Degree (Financial Planning, Finance, Accounting, Economics, or related field).
- CFP® Designation or on path to certification.
- Minimum of four years in the financial services industry, preferably in an advisory support role.
- Excellent client service and relationship management skills.
- Excellent organizational and time management skills; proven drive to consistently follow-through.
- Strong attention to detail and accuracy.
- Demonstrated superior written and verbal communication skills.
- Professional presence and communication skills.
- Ability to think critically. High sense of personal and professional pride.
- Self-motivated and able to prioritize work.
- High energy and desire/ability to work successfully in a fast-moving, small company environment.
- Flexible and adaptable, must respond well to ongoing changes of a growing and evolving firm.
- Experience working with Salesforce, eMoney, Charles Schwab, Fidelity a plus.
- You will be required to comply with a Code of Ethics which covers personal trading activities for you and members of your household.

Salary and Benefits

- Salary will be commensurate with experience.
- Bonus based on company and personal performance targets.
- Robust benefits package: 401(k), health & dental insurance, health savings account, generous paid time off allowance, professional development, gym access, and home office upgrades.

Contact Information

Please send a cover letter and resume to: skarns@theadvocategroup.com