

### **Wealth Management Firm Seeks Planning Associate**

Comprehensive wealth management firm with offices in Atlanta, Boston, Florida, and Northern NJ seeks a Financial Planning Advisor to join its team. Modera Wealth Management, LLC is an independent, fee-only firm that provides clients with comprehensive financial planning and investment management. Modera has been featured in *Inc. Magazine* as one of America's fastest growing private companies for three years (2012, 2013 and 2015). The work culture of the firm promotes collaboration, professional growth, and a commitment to providing exceptional client service. This is a full-time position for our Boston office which is in the heart of Boston's dynamic Back Bay district, conveniently located near the subway lines, commuter rail and major bus routes.

#### **Job responsibilities include but are not limited to:**

- Assist Wealth Managers/Advisors in preparing for and conducting client meetings;
- Conduct in-depth client interviews to gather personal financial data and to formulate planning goals;
- Develop comprehensive financial plans focusing on investment strategy, tax, retirement and estate planning, executive compensation, risk management, cash flow and education funding;
- Work with clients on the implementation of their financial plans;
- Participate in and take minutes of client meetings to support the primary relationship manager;
- Generate Investment Policy Statements, Morningstar reports, as well as asset allocation reports;
- Work with the client service team to facilitate new client on-boarding and monitor service requests;
- Assist the efforts of the firm's Financial Planning Committee;
- Perform other job-related duties or special projects as assigned.

#### **Qualifications for this position:**

- Minimum Bachelor's Degree.
- 0-3 years of financial planning experience desirable or equivalent financial planning coursework.
- Demonstrated desire or progress towards CFP® certification.
- Proven analytical and problem-solving skills.
- Detail-oriented with a demand for a high degree of accuracy.
- Highly proficient in computer software, including Microsoft Office.
- Excellent written and verbal communication skills.
- Team player, able to work well with all levels of the firm, as well as with clients.

#### **What we offer:**

- Competitive salary commensurate with experience.
- Performance-based bonus.
- Safe Harbor 401(k) plan with discretionary profit sharing.
- Medical, Dental, Long-Term and Group Life insurance.
- Flexible Spending Account.
- Paid vacation.
- Opportunities for professional growth and continuing education.

**No phone calls.** Please direct your cover letter and resume to: [Careers@ModeraWealth.com](mailto:Careers@ModeraWealth.com). All inquiries will be held in the strictest confidence. For more information about the firm, please visit [www.ModeraWealth.com](http://www.ModeraWealth.com).