Associate Financial Planner Position Description

To apply for this financial planning career position please submit information to candidate@newplannerrecruiting.com or www.newplannerrecruiting.com

For a video position description click here: https://youtu.be/mF9WQmk_VRU

What we are offering:

We are a rapidly growing, fee-only, tech-savvy financial planning firm with offices in New Hampshire and Massachusetts. We are looking for an Associate Financial Planner with 0-5 years’ experience who is passionate about Financial Planning to join our Manchester area, (Bedford) NH office. We are very interested in you if you are seeking a non-sales position and prefer to work with senior planners to serve our existing clientele by developing plans and researching client planning situations.

Initially you would research specific planning topics, help to prepare client plans, and respond to client requests. You would be expected to contribute to the full range of financial planning topics including retirement planning, estate plan review, insurance evaluation, employee benefits review, tax analysis and education planning.

What you will get to do:

- Participate in all areas of client meeting preparation and post-meeting follow-up
- Handle tax projections, social security timing and IRA withdrawals
- Prepare new or updated client financial plans
- Research issues such as Medicare options or education loan consolidation
- Learn office and custodian procedures for servicing clients, assist with internal workflow systems
- Provide strategic suggestions to improve internal client service systems

What we seek in a candidate:

- Passed CFP® certification examination, candidates working towards CFP® Certification will be considered
- Bachelor’s degree from accredited institution
- Strong written and verbal communication skills for client follow up
- Must demonstrate well above average ability in time management and organizational skills
- Specific experience with Orion, iRebal, Naviplan, Lacerte, and Office 2016 is preferred, but not required
Position perks:

- Mentoring by experienced, credentialed (CFP/CPA), senior planners
- Qualifies for apprenticeship 2-year work experience requirement for CFP® Certification
- Competitive salary, depending on experience and value proposition, and career track available
- Company contribution toward medical insurance
- SIMPLE IRA plan with 3% employer match
- Professional development budget for education and training
- Paid professional dues
- Flexible work environment
- Most up to date software technology and equipment available

The City:
Pursuing a career in financial planning in Bedford, NH means you will enjoy the best of all worlds; great quality of life, low personal taxes, and a low cost of living.

- Bedford is a suburb of Manchester, the largest city in NH.
- The Manchester-Boston regional airport is 10 min drive.
- Cambridge-Boston is only 1 hour drive to the south.
- The coast is only 1 hour drive to the east.
- The Lakes region is only 1 hour north, with skiing and hiking in the White Mountains north of the Lakes.
- New Hampshire has no sales or income tax.
- Manchester-Nashua is rated the cheapest place to live in New England by Forbes.
- NH typically has a low crime rate, low poverty rate, and is one of the healthiest states
- **Quality of Life** - Manchester residents point with pride to the fact that the area is “close to everything”, yet many people find they never have to leave home to pursue their favorite activities. In fact Manchester has recently been ranked among the top cities by a number of different magazines. The Manchester metro area was selected as one of America's “Best Places to Live and Work” and rated as a “Four-Star Community” by Expansion Management in May of 2003. But this is nothing new to the residents of Manchester. They know that Manchester has seen a renaissance of restoration, renovation, and rebirth, and is positioned well for continued growth and prosperity.