Financial Planner

Waltham MA

Peak Financial Management, a 30 year old fee based Registered Investment Advisor located in Waltham, Massachusetts seeks a fulltime and experienced Wealth Advisor/Financial Planner. We are a small wealth management firm providing comprehensive wealth management services to a fantastic, long-standing client base. We love our clients and believe that our wealth management offering is second to none.

The right candidate will have a passion for helping people reach their financial goals and will work hard to ensure that they are always providing the highest standard of service. They will care about their colleagues, have a desire to be on a team where everyone is responsible for each other and be interested in the success of the group. They will take the lead where necessary, follow where appropriate and exhibit a strong sense of pride in their work.

Primary Responsibilities:

- Serve as a relationship manager and main point of contact for assigned clients
- Develop and present comprehensive financial plans focused on cash flow, tax, retirement planning, estate planning and risk management
- Become completely knowledgeable about every aspect of our clients' finances so we can provide the best guidance and navigation to help them reach their goals
- Collaborate with CPAs, attorneys and other finance professionals to ensure a unified approach
- Help create new relationships to build the business. We feel our wealth management offering is second to none so why not provide it for others?
- Author articles and e-mails on current developments in wealth management to offer clients contemporary analysis and viewpoints
- Reach out to clients proactively to schedule meetings and offer assistance with ongoing and unanticipated financial/life events
- Participate in special projects and analysis with other team members to help drive company strategy
- Some local travel may be required

Qualifications:

- CFP® certification
- College Degree (financial planning, economics, accounting, finance, business preferred)
- Minimum of three years of professional experience in wealth management and financial planning for high net worth clients
- Strong knowledge of the investment markets and ability to articulate investment strategy
- Highest integrity and commitment to do what is right for the client
- Ability to present financial plans and lead discussions on strategy and alternatives
- Hard worker who is independent and takes initiative
- Excellent skills in presenting financial plans and a deep knowledge of financial planning software (preferably Money Guide Pro)

- Proficiency in CRMs (preferably Junxure), custodial platforms (Fidelity, Schwab and TDA), performance management systems (Orion), Microsoft Office (especially Excel)
- Excellent written, verbal and presentation skills
- Series 65 required or expected to be obtained within 60 days

Job Features:

- Hard but satisfying work where people have your back and will always help
- Surprise Foodler Fridays
- Vacation slide shows when the boss returns from holiday
- Occasional Red Sox tickets (and other events)
- Lots of snacks and endless cups of coffee
- Spontaneous, entertaining comedy provided by all staff members (including you)
- Enthusiastic support for your professional and career development