Financial Planning Associate

We are seeking a motivated team player with strong academic achievement as well excellent people and communication skills to join our fee-only investment advisory team. Our growing base of high-net-worth clients benefit from, and enjoy, the comprehensive, fully customized investment advisory and financial planning services we provide. Our core principle is to deliver unbiased, objective advice that serves our clients’ best interests. We are located on Route 16 in Wellesley, MA near Rte 128 (not near public transportation.)

Job Description—FULL TIME POSITION
The financial planning associate will help support our Senior Financial Planners in completing a variety of tasks including, but not limited to: updating/preparing client allocations, asset allocation analysis, investment research and meeting preparation as well as many other tasks related to financial planning. In addition, the candidate will be responsible for several administrative tasks. This is an entry level position which provides increasing responsibility, potentially leading to a role that would involve direct client contact.

The associate will have the opportunity to sit in on investment research meetings and other firm meetings and learn the wealth management business first hand. Daily tasks will vary widely and the individual will be expected to manage and complete multiple projects in a timely manner. We are a small office and all work very closely.

This is not a sales position and does not involve cold calling or any direct sales.

Qualifications
The candidate must be hard working, detail oriented, organized and communicate well both verbally and written. The candidate should enjoy working in a team environment but must also be able to work independently. Highest degree of integrity and honesty required.

Candidates must have a Bachelor’s degree with relevant coursework (finance, investments, and economics). Previous work experience would be beneficial, but is not required. We are looking for an individual who is self-motivated, dependable, and able to adapt/thrive in a changing environment. The ability to multitask is very important. Candidates must have strong computer skills, especially in Microsoft Excel.

Email your resume and salary requirements to recruiting@nepwealth.com No phone calls please.