At Austin Private Wealth, we take a "planning first" approach to prepare our clients and employees for a life of growth. You will join our motivated and energetic Client Services Team who ensure our clients receive courteous, thorough, and prompt service for their financial planning and investment needs. As our Senior Planning Analyst, you will support our financial advisors and clients through a variety of internal and client-facing tasks, including financial analysis, financial planning, and data gathering and entry. You will demonstrate leadership, introduce new processes and procedures, remove roadblocks and be a vital part of the success of the Client Services Team. The person in this role will have the opportunity to receive training and professional development to grow as a financial professional.

Primary Responsibilities

- Utilizing financial planning and reporting software (ex: eMoney, Black Diamond) to provide analytical insight to advisors and clients.
- Efficiently collect client information and data and disperse accurately across multiple client-facing platforms.
- Sincere client communication and support that embodies the vision and values of Austin Private Wealth.
- Confidently execute 401(K) rollover calls with clients.
- Partner with advisors for client meeting preparation and follow-up.
- Proactively and independently prepare financial planning scenarios.
- Strong administrative skills to assist advisors with comprehensive client meeting notes and thorough follow-up and support.
- Develop and collaboratively maintain systems and workflows with the team.
- Ability to provide sound financial planning advice.
- Awareness to recognize inefficiencies and provide solutions.

What You'll Bring

- Astute knowledge of personal finance and planning concepts.
- Comfort with quantitative tools, financial calculations, and projections.
- Exceptional written and verbal skills.
- A genuine interest in serving clients and others.
- Highly proficient with CRM systems, MS Office, and webinar software.
- Productive organizational and time management processes.
- A growth mindset, open to feedback, and committed to personal development.
- Keen attention to detail.
- Highly comfortable with various financial planning software and custodian interfaces.
- Ability to work cohesively in a team setting.
- Capacity to manage and prioritize many complex tasks.
- Positive attitude, kindness, and patience.
- Previous financial planning and/or investment experience.
- Perceptive and discerning analytical skills.

What's Required

- Bachelor's degree preferably in finance, accounting, or business.
- Series 65 designation; CFP.
- Understanding of financial industry regulation and best practices.
- 2–5 years of financial planning experience in an RIA environment strongly preferred.
- Hybrid schedule availability.