



## FINANCIAL PLANNING ASSOCIATE

We are seeking 1-2 Financial Planning Associates to join our team. As a Financial Planning Associate, you will assist our group of advisors in developing comprehensive financial plans for clients. This includes organizing and analyzing data, corresponding with clients, and collaborating with advisors to develop strategies and educate clients. This role has three primary components: (a) creating new plans for new clients, (b) updating plans for existing clients, and (c) researching the latest in financial planning strategies.

### *Job Requirements*

We are looking for a highly organized, detail-oriented person who takes pride in providing highly attentive client service. You should have at least 1-2 years of experience in a similar role and be comfortable communicating with clients.

- ★ Belief in the societal value of financial planning
- ★ Attention to detail and accuracy
- ★ Professional, concise and thoughtful writing ability
- ★ Excellent interpersonal speaking skills
- ★ Extraordinary client service orientation
- ★ A genuine interest in serving and caring for other people
- ★ Organizational and time management skills
- ★ An ability to handle multiple tasks and handle stress
- ★ Comfort with a fast-paced entrepreneurial environment

### *Qualifications:*

Knowledge of financial planning concepts and financial data analysis  
Should be willing to work toward getting the CFP® certification in the near future

### *Helpful:*

- CFP® certification
- Series 65
- Knowledge of financial planning software

## *Career Path:*

At AWM, Planners team up with Advisors to support clients. They are compensated according to the level of responsibility they take on, and the level of revenue they support. Planners have the ability to begin working with clients as Advisors as soon as they are ready, and we have a program to introduce them to clients they are prepared to serve. They are encouraged to take on Advisor functions at a comfortable pace. They can also increase their base compensation by achieving higher levels of competency as planners.

## *Compensation:*

- Competitive salary that adjusts upward with revenue supported
- Quarterly personal performance-based bonus
- Participation in company profit-sharing program
- Excellent benefits
- Flex-work arrangement that allows for maximum productivity and work/life balance

*Please visit our website for more details and to apply:*

<https://austinwealthgmt.com/career/financial-planning-associate/>