**Assistant Financial Planner**

**JOB DESCRIPTION**

**OVERVIEW:**

Clarity Financial Planning, a boutique financial planning & wealth management firm, is seeking a full-time entry level Financial Analyst to join our growing team.

[www.clarityfinancialplanning.com](http://www.clarityfinancialplanning.com)

We offer complete financial planning, inclusive of retirement, business, and estate planning for High Net Worth clients. The Financial Analyst will have an active role in understanding, analyzing, and reporting on our success of helping clients achieve their goals.

**CORE DUTIES & RESPONSIBILITIES**

* Assist in preparing client reviews, including reviewing and analyzing equity and life insurance allocations and documenting recap and follow-up items
* Learn new products, including investments, life insurance, and disability insurance. Interact with product and service vendors
* Become proficient in our numerous client reporting programs, including Albridge and **Riskalyze**
* Utilize our Financial Planning software **MoneyGuide Pro** to help build comprehensive financial plans.
* Administer a daily process for tracking clients and new prospects in the sales funnel in our **Smart Office CRM**
* Oversee calendar, including managing appointments, as well as ensuring timing and logistical details are in place
* Maintain CRM, including entering and updating client information and appointments
* Draft correspondence
* Assist in answering phones, greeting clients and potential clients, setting up conference rooms for meetings, etc.
* Coordinate with team to ensure all necessary paperwork and information is ready client meetings

**KNOWLEDGE, SKILLS & ABILITIES:**

* Microsoft Office Suite knowledge. Strong Excel skills with the ability to create spreadsheets and work with formulas.
* Ability to manage multiple, ongoing projects and work efficiently with a high degree of accuracy
* Excellent communication skills, both verbal and written
* Ability to prioritize and complete projects independently.
* High level of confidentiality required
* Ability to learn quickly and adapt to change
* Ability to pick up new technology easily
* Detailed-oriented
* Positive attitude and strong team player
* **Associate or Bachelor’s Degree in Business or** Finance preferred

**Compensation:**

Compensation is a combination of salary and benefits.

Additional information:

Fingerprinting is required for employment