THE ADVOCATE GROUP

Position Description

Title: Financial Planner
Reports to: Director of Client Service
Benefits: Yes
Location: Minnetonka, MN
Status: Full time

About The Advocate Group

The Advocate Group provides financial planning and investment management services. We specialize in navigating the unique financial opportunities and challenges facing executives and their families from some of Minnesota's most prominent companies. Our planning-centric process informs our ability to help coordinate complex cash flow, estate, charitable, tax and investment needs on behalf of our clients. Website: www.theadvocategroup.com.

Job Summary

The Financial Planner will be responsible for providing support to our financial planning team. This role provides client relationship support through gathering, managing and analyzing client data, helping to prepare financial plans and other client deliverables, working with clients to resolve issues and other practice management tasks, as needed. The right candidate will have opportunity for growth within the firm.

Responsibilities

- Communicate directly with clients and external client advisors to request and compile needed information
- Data gathering, entry and needs analysis
- Prepare for client meetings and handle follow-up for clients and team members
- Build new client financial models
- Maintain client contact throughout financial planning process
- Review and send summary letters to clients
- Diligently maintain accurate and up-to-date client records within the firm's CRM and other data management tools
- Manage and resolve client service requests
- Other responsibilities, as assigned

Qualifications

- Bachelor’s Degree (Financial Planning, Finance, Accounting, Economics or related field)
- CFP® Designation or on path to certification
- Minimum 1 year in Financial Services Industry
- Excellent client service and relationship management skills
- Excellent organizational and time management skills; proven drive to consistently follow-through
- Strong attention to detail and accuracy
- Demonstrated superior written and verbal communication skills
- Ability to think critically, high sense of personal and professional pride
- Self-motivated and able to prioritize work
- Desire/ability to work successfully in a fast-moving, small company environment
- You will be required to comply with a Code of Ethics which covers personal trading activities for you and members of your household.
- Experience working with Salesforce, or other CRM, eMoney or other planning software, Charles Schwab, Fidelity

Salary and Benefits

- Salary will be commensurate with experience
- Bonus based on company performance targets
- Benefits include 401(k), health care, dental

Contact Information

Please send a cover letter and resume to: chogan@theadvocategroup.com

The Advocate Group, LLC is an Equal Opportunity Employer