Ameriprise Financial

Minneapolis Wealth Advisors

A private wealth advisory practice of Ameriprise Financial Services, Inc.

Financial Planning Analyst

Minneapolis Wealth Advisors

Minneapolis Wealth Advisors, located in downtown Minneapolis, is a locally and nationally recognized comprehensive financial planning practice. We serve a diverse group of successful families and individuals using a high-touch, client centric service model, supported by deep expertise. We are one of the largest and most rapidly growing Ameriprise-affiliated practices in the nation.

The Employee Experience

Our firm is growing through strong referrals from our clients. Business growth is creating opportunity for team members to learn, grow in their own role and take on new challenges. Our practice believes in service (not sales) achieved through the power of collaboration across a broader team. We expect individuals to utilize their strengths working together with other team members to deliver an exceptional client experience. Culturally, we are hard-working, fun and enjoy the camaraderie that comes from a tight-knit group. Our office location is at 6th & Nicollet and includes access to a fitness center and a variety of amenities available in the heart of downtown Minneapolis. We offer above average compensation and traditional benefits such as health insurance, a SIMPLE IRA plan with employer match, disability insurance and parking/transportation subsidy. The firm provides monetary support for licensing and costs associated with obtaining the CFP® or CFA® professional designations. We are currently working in hybrid mode, allowing both work from home and in-office with room for personal schedule flexibility.

Position Description and Responsibilities

Candidates should have a strong interest in becoming a Financial Advisor and providing advice on both financial planning and investment topics. The Financial Planning Analyst will learn all aspects of comprehensive financial planning and investment management while serving clients side-by-side with our financial advisors. ***For a highly motivated individual, this position is designed to evolve into the role of Financial Advisor with full responsibility for leading all aspects of client relationships. For someone interested in building amazing skills, this position will provide a unique opportunity for personal growth with access to two Principals (one a former Accenture Partner and the other a former public company CEO), six exceptional Lead Financial Advisors, and four Financial Planning Analysts. The clients we serve are highly accomplished – creating an environment full of challenges and continual learning. Our clients include corporate executives, partners at professional services firms, small business owners and successful retirees.***

Responsibilities of the Financial Planning Analyst include:

- Participate actively in client meetings (25%)
  - Capture and document recommendations & key decisions
  - Document conversation with client and any necessary compliance topics
  - Communicate planning and investment topics with clients as skills develop. ***Our goal is for Financial Planning Analysts to develop the ability to run an entire client meeting with lead advisors providing minimal support.***
- Analyze client situations in preparation for comprehensive client meetings (25%)
  - Design customized financial plans to help client achieve their life goals (e.g. retirement, education)
  - Identify, calculate, and prioritize client-specific planning opportunities
  - Calculate the impact of tax strategies using sophisticated tax software

    - Create illustrations for education, insurance and estate planning topics using Ameriprise and Minneapolis Wealth Advisors proprietary tools
    - Research client-specific planning opportunities, identify potential solutions, and prioritize
- Construct custom client investment portfolios (25%)
    - Review client-specific portfolio allocations and identify opportunities for diversification and rebalancing based on relative valuations
    - Draft investment recommendations to implement portfolio changes and optimize lifetime tax
    - Assist clients with making changes in outside accounts
    - Research client-specific investment opportunities in outside accounts and contracts
- Implement client opportunities with exceptional service (25%)
    - Write client emails documenting follow up items from client meetings
    - Assist clients independently with implementation of specific planning and investment strategies. Communicate in-person, by video, by phone and by email depending on the situation.
    - Support periodic campaign-style outreach to clients based on market volatility and relative asset class valuations
    - Coordinate administrative topics for clients by providing clear direction to the Minneapolis Wealth Advisors support team and outside professionals (CPAs, estate planning attorneys, mortgage bankers, insurance professionals and third-party administrators)

Our deep expertise and commitment to service excellence has created a steady flow of new clients. As a result, we have a continual need for additional Lead Financial Advisors. Our preference is to provide these opportunities to Financial Planning Analysts that have grown with us and supported our culture. The path from Financial Planning Analyst to Lead Financial Advisor is essentially self-paced. At Minneapolis Wealth Advisors, the Financial Planning Analyst acts as the quarterback of the client relationship and is therefore well-positioned to build the skills and trust necessary to lead these relationships over time.

Qualifications

- Undergraduate degree required
- 1-5 years of work experience preferred
- Professional designation (CFA, CPA, CFP, JD) or Masters in related field ideal but not required
- FINRA Series 7, Series 66 and applicable insurance licenses required within 1 year of hire
- Outstanding verbal, written and listening communication skills
- Desire to work in a fast-paced team environment
- Ability to learn quickly, stay organized, manage time, and follow tasks through to completion
- Client focus with a high attention to detail

If your qualifications and interests match our needs, we look forward to reviewing your resume. For more information about our firm, visit our website: https://www.ameripriseadvisors.com/team/minneapolis-wealth-advisors/ To Apply: please forward your resume to Mark Joern at mark.w.joern@ampf.com.