IF INTERESTED please contact Jillian Lemmo directly at Jillian@bcius.com:

Lead Planner (632) | Remote work opportunity

Disruptive wealth management firm/platform offers unique opportunity for remotely located CFP to directly manage client relationships and prepare/deliver comprehensive financial plans.

RESPONSIBILITIES:
Work directly with clients via video conference/phone/e-mail
Act as financial life coach for clients to help identify their passions and achieve their goals/objectives
Professionally/objectively build/deliver custom financial plans ensuring highest quality product and delivery of unparalleled customer experience
Prepare for client meetings (collect/organize/synthesize client data within financial planning context)
Work with team members to complete follow-up tasks from client meetings (record meeting notes, complete additional planning/investment management tasks and coordinate work)
Handle client service responsibilities (regular client contact/communications, conduct account reviews, and address client related communications)
Provide clients with asset management solutions (review portfolios, coordinate withdrawal needs, deliver tax strategies for assets under management, rebalance portfolios, and assist with implementation of new portfolios)
Develop/prepare client financial plans/presentations for review by team members
Partner with team members to manage operational items as they relate to client accounts (submit requests to operational team for account paperwork, initiate/track transfers and account funding, implementation of asset allocation recommendations, service requests, and client online account access
Work with team members to coordinate insurance applications/underwriting (for life/disability/long-term care insurance policies) through our strategic partnership with an independent insurance brokerage firm

REQUIREMENTS:
Bachelor’s degree or higher
CFP designation required (it is expected you will desire to pursue additional industry/financial planning related education)
Background/experience in financial services industry; knowledge of key financial/investment/risk management concepts
Willingness to work independently, with guidance/oversight from team coach
Client first attitude; professional demeanor; personal integrity/understanding of fiduciary responsibility; excellent computer skills including ability to learn in-house software/tools; superior interpersonal/organizational/client service skills; excellent written/verbal communication skills; dedication to developing career in financial services industry with potential for advancement within the company