COBBLESTONE
CAPITAL ADVISORS

Wealth Planning Analyst

Cobblestone Capital Advisors, LLC is a privately-owned, Rochester-based, SEC-registered, investment advisor offering comprehensive investment advisory and wealth management services. The firm manages over $2.25 billion in assets and has experienced steady growth since its founding in 1986.

We are currently looking to add an entry-level member to our Wealth Planning Team. This is an exceptional opportunity for an early-career financial planner to learn all aspects of financial planning and make substantial contributions to our firm and clientele. Ideal candidates should have a passion for financial planning as their chosen profession.

Position Overview
This professional position will support the Wealth Planning Group team members directly in managing existing and new client relationships. You will be responsible for assisting with various projects including the preparation of financial planning analysis and working with team members to prepare for client meetings. Wealth Planning Group team members will be available to provide mentoring, direction and support, but you will be expected to be able to work independently and utilize critical thinking skills.

Duties and Responsibilities

- Collect, organize, aggregate, and continuously monitor client information with accuracy
- Be involved with pre-client meeting activity, including but not limited to, preparation of meeting agenda and materials, financial projections, miscellaneous research, and special projects
- Engage in post-client meeting tasks such as revising meeting agenda and notes, performing follow-up analyses, and coordinating with the other team members
- Handle data entry and client support for the firm's financial planning software - eMoney
- Assist other members of the firm with both firm and client-related projects
- Interact with clients and colleagues in a professional and respectful manner
- Master the efficient use of various software programs utilized by the firm to generate both internal and external reports and presentations
- Continue to develop financial planning knowledge and expertise

Qualifications

- Position requires a self-motivated, goal-oriented, responsible, highly-detailed, personable individual
- Bachelor's degree
- Strong proficiency with Microsoft Office suite, especially Excel
- Ability to manage time effectively, set priorities, and meet deadlines
- Strong written and verbal communication skills
- Strong analytical skills
- Must be able to work as part of a group and independently
- Commitment to pursue Certified Financial Planner certification upon employment
- 0-3 years of experience

Interested applicants should apply here:
https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&ccId=19000101_000001&jobId=455001&source=CC2&lang=en_US

No phone calls, please.

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship or immigration status, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.