COBBLESTONE
CAPITAL ADVISORS

Wealth Planner Job Description

We are a growing Wealth Management Firm located in Rochester, New York, seeking an experienced Wealth Planner to join our expanding team. This is an exceptional opportunity for an intelligent, responsible person with a high degree of initiative, strong communication skills and a desire to continue to learn to make substantial contributions to our firm and clientele.

Position Overview

This is a professional position and requires that the candidate has the ability to work comfortably with firm clients, addressing their financial needs in an appropriate manner.

The Wealth Planner is an integral member of the Cobblestone client service team. Key responsibilities of the Wealth Planner role include preparing and presenting financial planning reports and maintaining client relationships as part of the client's service team. You will also be responsible for supporting Wealth Planning Group team members in managing client relationships where appropriate and assisting with various firm-wide projects. 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.

Job Responsibilities

- Direct responsibility for managing and meeting client wealth planning needs
- Prepare and present financial planning reports with clients (retirement projections, estate planning, income tax planning, education funding, etc.)
- Collect, organize, aggregate and continuously monitor client information with accuracy
- Support Wealth Planning Group team members as needed in addressing client and departmental needs
- Assist other members of the firm with both firm- and client-related projects
- Interact with clients 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

Qualifications

- Three years or more of financial planning experience including direct client responsibility
- Certified Financial Planner certification or pursuit of such certification upon employment
- Position requires a self-motivated, goal oriented, responsible, highly detailed, personable individual
- Must be able to work as part of a group and independently
- Bachelor's degree
- Strong analytical, verbal, written and organizational skills
- Excellent computer skills, proficient in Microsoft Office including Word and Excel. Experience with eMoney Financial Planning Software is a plus.

Compensation and Benefits

- Pay/Benefits are competitive based on industry standards and experience; the anticipated base salary range is $70,000 to $100,000 but may be adjusted commensurate with candidate experience and qualifications.
- Performance Bonus
- Benefits include health care, paid vacation, 401(K)

Interested candidates must apply here:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&ccId=19000101_000001&jobId=467918&source=CC2&lang=en_US

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.