Wealth Planner
Rochester, New York

JK Executive Strategies is proud to partner with a **privately owned, Rochester based, SEC registered, investment advisor** in its search for a **Wealth Planner.** The firm offers comprehensive investment advisory and wealth management services.

The Wealth Planner is a highly analytical, personable candidate, who can comfortably work with the Firm's clients to address their financial planning needs. This is a professional, non-sales, financial planning-centric role. The Wealth Planner is an integral member of the Firm's client service team. Key responsibilities of the Wealth Planner role include, but are not limited to: preparing and presenting financial planning reports and maintaining client relationships as part of the client's service team.

Responsibilities

- Direct responsibility for managing and meeting client wealth planning needs.
- Prepare and present financial planning reports with clients (retirement projections, cash flow analysis, estate planning, income tax planning, education funding, etc.).
- Review tax, insurance, and estate planning documents as needed to identify and communicate planning opportunities to clients.
- Provide exceptional service to clients collaboratively with the entire client service team.
- Interact with clients in a professional and respectful manner.
- Collect, organize, aggregate, and continuously monitor client information with accuracy.
- Collaborate with Wealth Planning Group team members as needed in addressing various client, departmental, and firm-wide needs.
- Maintain current industry/planning knowledge through attendance at seminars and industry presentations.
- Master the efficient use of various software programs utilized by the firm to generate both internal and external reports and presentations.
- Other duties as assigned.

Requirements

- Bachelor's degree, required.
- Certified Financial Planner certification preferred, or pursuit of such certification upon employment.
- Three years or more of financial planning experience, including direct client responsibility.
- Position requires a self-motivated, goal oriented, responsible, highly detailed, personable individual.
- Strong analytical and problem-solving skills.
- Professional, friendly demeanor with the ability to excel in a team environment.
- Excellent verbal, written and organizational skills.
- Proficiency in financial planning software, including Microsoft Office (Word, Excel and PowerPoint).

Salary Range

- $80k – 130k

Please apply here: https://careers.jkexec.com/#/jobs/1370

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