LEGACY WEALTH MANAGEMENT | Right by you.

To apply for this position please submit information to careers@legacywealth.com

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Financial Planner Job Description

We are seeking a Financial Planner and Relationship Manager for our fee-only wealth management company in Memphis, TN. We are very interested in you if you are a CFP® certificant or CPA, want to learn from a team of established professionals, you enjoy work that is challenging and requires a high level of attention to detail, and you want to focus on nurturing our existing client relationships as well as developing new client opportunities. Candidates that fit into our firm and culture have excellent communication skills, will believe in a holistic planning focus for high net worth clients, a tactical asset allocation management philosophy, and a commitment to a fulfilling work/life balance.

Position Overview

This is a professional position that will support a Director of Client Services directly in managing existing and new client relationships. You will be expected to assist in preparing financial projections using Money Guide Pro financial planning software. Thorough computer skills are essential with a strong understanding of Microsoft Office programs. A working knowledge of portfolio allocation and investment management is expected. The Director of Client Services is available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions. The firm owners are looking for a long-term fit and the right candidate may have the opportunity to grow into a future owner of the firm.

Initial Key Areas of Responsibility:

- Prepare financial plans and retirement projections
- Involvement in all aspects of client meeting activities such as preparation of meeting agendas, client paperwork, risk tolerance assessments, asset allocations as well as follow-up tasks such as develop meeting notes, perform financial situation analyses, tax projections, and coordinate planning implementation with clients and outside professionals as necessary
- Regularly monitor clients' financial situations with attention to detail and accuracy
- Interact with clients over the phone and in person professionally and respectfully
- Work with custodial platforms Fidelity, Schwab, National Advisors Trust; Microsoft Office programs, Tamarac CRM, and Money Guide Pro

Key Qualifications:

- B.A. or B.S. degree from accredited four year university, preferably in finance or accounting
- CFP® certification with 2-5 years of client facing experience, or CPA/PFS with similar experience
- Organized, with a strong attention to detail
- Strong financial and analytical skills
- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player
- Able to work independently
- Able to perform multiple tasks efficiently
- Show curiosity and confidence when dealing with clients and principals
- Above average knowledge of Microsoft Office programs

Benefits:

- Competitive salary with bonus program and long-term career track available
- Company subsidized health, dental, vision
- 401k/profit sharing plan with generous match
- Professional development budget for CE, conferences and training
- Paid professional dues
- Mentorship and Learning Opportunities

We truly have a team environment that fosters collaboration and always puts the client first. If you enjoy being part of a team and continuous learning, Legacy Wealth Management would be the ideal opportunity for you.