



# Example of Manager, Financial Planning Job Description

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Our company is growing rapidly and is looking to fill the role of manager, financial planning. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for manager, financial planning

- Supervise and coordinate efforts of FAST Financial Planning with the activities of Regional Directors, the Financial Planning Department and various other departments within the company
- Initiate and support sales themed marketing campaigns by organizing and implementing phone and email based campaigns and creating virtual and live presentations
- Track, monitor and analyze team activity via daily, weekly and monthly activity reports
- Foster the creation of sales presentations based on advisor profiles, needs and feedback
- Provide training, resources and direct FAST Financial Planning in sales and sales support concepts to foster professional growth
- Stay current on industry trends by reading industry publications, monitoring industry websites, attending industry conferences and meeting continuing education requirements
- Participate in and conduct sales, leadership, product and technical training to enhance team effectiveness
- Provide consistent management and training feedback to the FAST Financial Planning team
- Supervises cost accounting function and leads efforts to identify, analyze and, ultimately, implement programs designed to reduce the labor and overhead costs associated with production of the Company's products

## Qualifications for manager, financial planning

- Lead and coach a Channel Communications team to deliver Financial Planning communications while encouraging and further developing a strong working relationship with the business being seen as an extension of the FP team
- BS in Economics, Accounting or Finance with 7+ years of experience in retail or financial analysis
- Bachelor's degree in Finance or relevant field highly preferred
- Ability to train financial advisors
- Must be comfortable independently evaluating a situation, exercising judgment, and determining when to escalate to management level
- Must be able to prioritize work in order to gather data related to client assets and the movement thereof and to determine course of action