



# Example of Planning Consultant Job Description

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Our innovative and growing company is hiring for a planning consultant. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for planning consultant

- Comply with all rules and regulations of selling securities as outlined by FINRA and SEC any guidelines established by the company
- Consult with Financial Advisors and their teams on how to use MoneyGuidePro to create financial plans and deliver recommendations to clients
- Understand and communicate the benefits of engaging clients in a goals-based relationship and drive productivity by using best-in-class tools to deliver an exceptional client experience
- Work with financial professionals to ensure they have the tools, support and resources they need to lead with planning in the disciplines of retirement, estate and wealth transfer
- Develop content / educational materials for Financial Advisor and client use on financial planning related topics
- Drive adoption of non-users of financial planning by developing job aids and other training materials
- Consults and collaborates with management and medical leadership in the development and assessment of clinical care line, business line and departmental plans
- Identifies business opportunities, develops proposals and business plans
- Serves as a key resource for management personnel at all levels to meet their needs for data and market information
- Creates, applies, and maintains information resources (e.g., environmental assessments, trends in customer needs, healthcare technology and treatment, regional market conditions)

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- Primary work focuses on developing terminal concept plans, programming facility requirements, performing space analyses, preparing presentations and technical reports for the terminal planning group
  - Project types vary across several practice areas, including terminal plans, terminal area plans, master plans, airfield layouts, parking facility plans, and sustainability studies
  - Bachelor Degree in related field (Business, Finance, ), required
  - Interpersonal and Inter-relational Skills - a good listener, especially when suggestions and feedback are offered
  - Demonstrable experience of working as a senior/principal planning officer or consultant in the public/private sector
  - A high level of knowledge and understanding and application of current and emerging environmental planning legislation