

Our innovative and growing company is looking to fill the role of wealth planning. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for wealth planning

- Gather and evaluate financial data including deposits and loans, qualified retirement accounts, social security benefits, life, disability, long term care insurance coverage, deferred compensation, stock options, brokerage assets, trust and investment management accounts, legal instruments such as financial powers of attorney, wills, advanced healthcare directives, educational funding plans, philanthropic/gifting entities and business succession buy/sell agreement, installment sales
- Assist with mailings and communication to prospective clients
- Assist with creating and updating manuals
- You will also be responsible for processing applications and entering information in the database system
- Aggregation and review of monthly financial outlook estimates across various income statement categories
- Create and maintain market packages for Regional Directors representing 18 locations and 450 Financial Advisors across the United States
- Prepare reporting for monthly management business reviews to discuss business trends, opportunities or risks
- Provide detailed and meticulous administrative support to the Wealth & Estate Planning Specialist
- Input a wide variety of client data onto our system in a timely and efficient manner
- Create mock ups of data plans as requested by the Wealth & Estate Planning

Qualifications for wealth planning

- Strategic planning for improvement and growth of the business
- Change Leadership – Can effectively cope with change, handle risk, uncertainty and can make good decisions
- Results oriented – can set and meet goals for self
- Excellent written and verbal communication, Demonstrated ability to earn respect of staff
- Excellent level of social skills
- Minimum 5-7 years industry experience with thorough understanding of securities industry, fiduciary standards, and industry rules and regulations