

ASSOCIATE PLANNING SPECIALIST

FIRM OVERVIEW

Serve. Grow. Live

Three simple values that describe an outstanding culture and career opportunity.

- **Serve** our clients, our community and each other in all that we do
- **Grow** personally, professionally and as a firm with our client's goals top of mind
- **Live** a great life as part of a team with a noble purpose

Founded in 1979, Strategic is a Financial Times 300 Top Registered Investment and Investment News Best Places to Work. We are a dynamic team of over 30 professionals managing over \$1.4 Billion in clients and delivering an exceptional wealth management experience to Strategic's clients.

POSITION OVERVIEW

Strategic is a team of good people delivering consistent service with a straightforward approach to our clients. We believe every client should have a financial plan, and our growing Financial Planning Center are the brains behind each one. The Associate Financial Planning Specialists, in partnership with other members of our Financial Planning Center, support advisors and clients through research, analysis, and the production of valuable, client-facing planning deliverables.

RESPONSIBILITIES

- Partner with Advisors and Financial Planning team members to identify upcoming client planning needs.
- Prepare accurate and aesthetic planning deliverables, such as retirement projections, cash flow forecasts, and insurance summaries using templates and planning software.
- Manage and prioritize workload to ensure on-time delivery.
- Help systematize frequently requested deliverables.
- Help identify and develop new planning services.
- Stay abreast of changes in laws and regulations which impact planning services.

QUALIFICATIONS

TECHNICAL/EDUCATIONAL

- High technological proficiency including Microsoft Office applications, with highly advanced knowledge of Excel. Orion Advisor experience a plus.
- A demonstrated interest in financial planning required.
- Strong and relevant academic credentials (bachelor's degree required).
- The Certified Financial Planner ("CFP") designation, or the ability and willingness to achieve the CFP designation within 3 years, is required.
- Excellent written and verbal communication skills.
- 3-5 years of relevant experience preferred.

VALUES: SERVE, GROW, LIVE

- Believes in Strategic's purpose, vision, and values
- Attention to detail, rigorous work ethic, humble attitude
- Passionate about helping people
- Continually exhibits personal integrity and personal initiative
- Demonstrated ability to drive growth and improve productivity
- Reliable, follows through on commitments, does not shrink from new challenges
- Organized, able to multitask and work independently when needed
- Ability to collaborate and work effectively with others
- Flexible team player who is highly adaptable to change and open to innovative ideas
- Demonstrated ability to work successfully in an entrepreneurial, small company environment
- Provide references upon request