THE JOSEPH GROUP
CAPITAL MANAGEMENT

Role Description

Role: **Experienced Financial Planner/Para-Planner/Wealth Advisory Associate**
Reports to: Team Lead
Benefits: Yes
Status: Full Time
Date: July 2024

Role Summary

This Experienced Wealth Advisory Associate will have a clear path to Client Advisor and create leverage for Advisors and the Advisor Team by working in tandem with Advisors in offering The Joseph Group's full-service financial planning model. A successful candidate will:

- Live and exemplify The Joseph Group's Core Values of Integrity, Teamwork, Humility, Excellence and Enthusiasm
- Have a true passion for helping clients live great lives
- Be a self-starter and be skilled at dealing with multiple projects and priorities
- Have work experience and a working knowledge of financial planning concepts, markets, and technology

Duties and Responsibilities Include, but are not limited to:

- **Supporting Advisors**
  - Prepare client financial plans while working closely with Advisors on plan design and implementation
  - Prepare and follow-up on client meetings
    - Assist Advisors by preparing agendas; gathering reports and information; and updating financial plans prior to meetings
    - Execute tasks and projects resulting from client meetings
  - Attend client meetings where applicable

- **Supporting Clients**
  - Build trusting relationships with clients via the TJG Way (Purpose, Plan, and Portfolio)
  - Be a point of contact for clients for various day-to-day needs

- **Supporting Team & Firm**
  - Serve as a vital member of The Advisor Team by working on internal projects and initiatives that allow TJG to serve clients more efficiently and effectively

- Become a “super-user” of the company CRM, financial planning software, and portfolio management software
- Seek continuing education to stay current on planning topics and industry information
- Be actively involved in TJG events and follow up
- Assist with firmwide projects

Qualifications

This position typically requires the following qualifications:

- Work experience that demonstrates knowledge of the financial industry and planning concepts
- Excellent communication, listening, and relationship building skills
- Strong project management skills – organized, detail-oriented, and able to multitask and prioritize
- A passion for caring for clients
- CFP® designation or current pursuit of the CFP® designation is a plus
- A Team player in The Joseph Group’s “Best Places to Work” culture
- Desire/ability to work successfully in a small company environment
- Proactive, self-motivated personality
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include health insurance, 401(k), disability insurance…
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Contact

Send resume and cover letter to:

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