



Financial Planner Position

Demming Financial Services Corp. is seeking an experienced and knowledgeable Financial Planner to join our team. The Financial Planner position is responsible for developing and managing client relationships, presenting comprehensive financial plans, and working directly with clients to deliver sound financial advice specific to the client's needs. This position reports to executive leadership.

Responsibilities of the Position

- Adhere to the Firm's Best Practices & Code of Ethics.
- Learn and understand the firm's investment process & philosophy.
- Meet with client regularly to build and maintain client relationships
- Deliver sound financial advice to clients based on their specific needs and goals
- Develop and present comprehensive financial plans
- Be a point of contact for clients and staff regarding high level planning or investment questions

Required Skills and Experience

- Bachelor's Degree
- 5+ years' experience in financial planning and/or investment services
- Experience in client facing role
- Knowledgeable in investments & financial planning strategies
- Reliable and exceptional work ethic
- Effective communication with clients and other planners/staff

Preferred Skills and Experience

- CFP® designation or ability to obtain within 1 year
- Financial planning software experience (eMoney or MoneyGuidePro)
- Brokerage platform experience

Compensation & Benefits

- Competitive Salary – Commensurate with experience
- 401(k) & Profit Sharing
- Discretionary Bonus
- Health Insurance
- Annual spending for continued education

About Demming Financial Services Corp.

We are an independent, family-owned, financial planning firm practicing since 1979. As one of NEO's largest RIA firms, we manage north of \$500M directly on an independent, third-party platform. Our CFP® practitioners serve a variety of clients from business owners, corporate and sales executives, health care professionals, divorced and widowed spouses, to teachers and retirees. Our role is to help clients make educated decisions about their priorities and goals, lighting a path to get there.

Contact & Apply:

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