Financial Planner

We are seeking a highly motivated, detail oriented, and experienced Financial Planner to join our team, reporting to the Manager of Financial Planning. The Financial Planner will work closely with our Lead Advisors in a team-based setting and will be instrumental in the continued growth of Marcum Wealth. The Financial Planner is expected to directly impact the business by designing customized personal financial solutions for new and existing clients.

Job Responsibilities:

- Own and drive the financial planning process, which includes designing, analyzing, and presenting customized plans tailored to each client's facts and circumstances.
- Identify issues and planning opportunities for review and discussion with clients and clients' advisors. Areas of emphasis include financial goals analysis, estate planning, education planning, tax planning, insurance needs analysis, college savings, Social Security planning and optimization, and executive compensation planning.
- Deliver plans to clients and their advisors in a clear and understandable manner. Responsibilities will include financial plan construction, presentation of the plan to the advisor, and occasionally presentation of the plan to the client.
- Coach and counsel advisors on financial planning strategies via formal training or as part of financial plan reviews.
- Become a subject matter expert, staying current on planning issues, communicating updates to staff, and contributing content to the Firm's website (blog) and other channels.
- Assist with development and presentation of training programs for internal staff.
- Contribute to the Firm's strategic direction of its financial planning service offering.

Qualifications and Requirements:

- CERTIFIED FINANCIAL PLANNER™ (CFP®) designation required.
- 3+ years of financial planning experience.
- Bachelor's degree (MBA strongly preferred).
- Proficient in Microsoft Office suite (Word, Excel, PowerPoint).
- Proficiency with financial planning, Social Security analysis, tax implications of planning; MoneyGuidePro, eMoney, Orion, and Redtail experience a plus.

- Professional, personable, tactful, efficient, and self-motivated.
- Strong interpersonal skills and sense of teamwork valued.
- Not just a proficient technician. Experience presenting to clients in a competent, confident, persuasive, and empathetic manner. Able to formulate knowledgeable and convincing answers to tough questions on the spot.
- Strong organizational skills, multitasking, accuracy, service-minded, and meticulous adherence to details required.
- Entrepreneurial-minded approach to business; small/midsize company experience preferred.
- Strong written and verbal communications skills.

To Apply:

- Please send your resume and cover letter to: Alynne.zielinski@marcumwealth.com
- Include in your subject line “Application Submitted from FPA Careers”