Wealth Planner

Sequoia Financial Group is a growing Registered Investment Advisor (RIA), headquartered in Northeast Ohio, offering financial planning and wealth management services. At Sequoia, we exist with a singular purpose: to enrich lives. Our values define how we behave and guide us through the pursuit of our purpose to enrich lives. At Sequoia, our core values are:

- **Teamwork**. We work selflessly to enrich the lives of our clients and our community.
- **Passion**. We relentlessly pursue our full potential.
- **Integrity**. We act in the best interest of others.

Summary of Position

We seek a motivated, self-starting, passionate team player to join our any of our offices in Tampa, FL, Troy, MI, Columbus, OH, Cleveland, OH, Beachwood, OH or Akron, OH in the role of Wealth Planner. The Wealth Planner is a member of the Wealth Planning Department. The Wealth Planner prepares comprehensive financial plans and works with our client facing advisors to develop technical wealth planning advice and resources related to retirement, education, insurance, estate, business succession, philanthropic, and other financial planning services that are delivered to our clients.

Responsibilities

- This position interacts with advisors to gather data for the initial plan or plan review.
- Duties include entering client information into comprehensive financial planning software, producing analytical reports for use in the plan, and identifying and recommending appropriate planning strategies to deliver a great client experience.
- Serve as an ongoing resource to client facing advisors to answer technical planning questions.
- Develop a deeper expertise in a specific technical area as agreed upon with the manager/department leader. This specialization will drive firm wide philosophy related to the area of expertise and be responsible for enhancing our client deliverables and creating efficiencies around the analysis process.

Required Skills/Experience

- Bachelor's Degree - Prefer a degree in Financial Planning or Finance
- CFP® or advanced credential in related practice area (ex., JD, CPA)
- 3-5 years+ experience in financial planning
- Strong technical knowledge base covering all aspects of comprehensive financial planning including cash management, income tax planning, insurance, education planning, retirement planning, estate planning, and risk management, paired with an ability to collaborate with advisors and clients making technical conclusions applicable in real life
- Experience working with financial planning software
- Competency with Microsoft Office products

Preferred Skills/Experience

- 7-10 years of experience preferred not required
- Experience with eMoney software preferred not required
- Expert understanding of business succession, estate, philanthropic, insurance, education, and financial planning, including applicable legal, tax, and regulatory requirements.

Competencies

- Excellent analytical and problem-solving skills
- Excellent written and oral communications skills
- Self-starter and ability to function with autonomy
- Keen attention to detail
- Ability to prioritize multiple concurrent tasks and adhere to established deadlines
- Adaptable and able to work collaboratively
- Client service orientation

For further information please contact Kristen Kartisek, Senior Recruiter

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