

Assistant Financial Planner

We're growing and you can help! We need a **confident, self-starter** who has a **passion for excellence** in providing financial planning that contributes to our clients' peace of mind.

If you'd like to gain experience working with a highly skilled small and committed team who is passionate about improving the lives of individuals, families and small businesses, Financial Service Group might be the place for you.

If you're that special person who loves to **help people**, who isn't afraid of **working hard and multi-tasking**, who has **well-developed communication skills** and is **eager to begin or advance a career** in fee-only financial planning, we need you to contact us to initiate a closer look.

As an assistant planner, you will discover the various duties and responsibilities associated with working in a premier fee-only financial planning firm. You will work directly with clients on service issues, prepare and attend client meetings and reports, and complete projects in various disciplines (marketing, research, technologies, etc.) intended to improve our service delivery to our valued clients.

A bachelor's degree in Personal Finance or completion of a program in financial planning through a CFP Board-Registered institution is preferred, and coursework in personal finance as part of a related major will be considered. We seek an individual who is eager to learn all aspects of the finance industry, has a goal to obtain a Certified Financial Planner designation and demonstrates a passion for helping people obtain peace of mind through fee-only financial planning. The ideal candidate will have computer skills (MS Office and database management preferable), demonstrated organizational skills and a customer service aptitude (a desire to work with clients and communicate at a high level verbally and written).

If you're a **goal-oriented, team-player** who is **trustworthy, friendly, optimistic**, and **conscientious**, please read on. If you have a **healthy attitude** you want to share with others, please read on. If you **work with little oversight** and **enjoy an intellectually stimulating environment**, and if you're ready to start on your path to an Assistant Financial Planner, let's learn more about each other!

Call us - 262-554-4500

Visit us - www.ToYourWealth.com

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