Broadview is looking for a Financial Planner!

Broadview Financial Management provides comprehensive financial planning and investment management services tailored to individuals and families, including high net worth and to those just getting started. Our firm is seeking a Financial Planner to join our team.

Because our firm is small, every team member plays a critical role and is needed to make a tangible difference. Your knowledge, experience, and positive attitude will be integral to our team and an exceptional client experience. Our ideal candidate is a self-motivated professional with an understanding of complex financial needs, personal goals, and family dynamics to build strong relationships with new and existing clients. In addition, our financial planner has strong communication and time management skills, articulates complicated concepts in an easy-to-understand and actionable fashion, has a strong work ethic, works well both in a team environment and independently, and has excellent computer skills (Microsoft Office, Morningstar, MoneyGuidePro, Redtail, or comparable systems). Minimum requirements are a bachelor's degree, at least 3 years of financial planning experience, and an exemplary regulatory/licensing record. CFP, CFP candidate or PFS credentials and experience with Fidelity and Schwab platforms are preferred.

RESPONSIBILITIES

- Help clients establish realistic goals and develop a roadmap to financial security.
- Serve as a fiduciary, putting the client's interests first.
- Demonstrate high regard for standards of the profession and all compliance requirements.
- Meticulously prepare for client meetings with a thorough review of the client file and CRM system notes.
- Meet with clients (in person, phone conference or Zoom) to gather or update personal and financial information, as well as details about their goals and objectives. Review and analyze the information to provide objective, personalized advice and financial plans, with appropriate written documentation.
- Provide financial advice that may be comprehensive or ad hoc depending on the client's needs. Perform comprehensive planning, including cash and debt management, college funding, tax planning, retirement planning, investment planning, insurance, and estate planning.
- Develop strong client relationships through effective, efficient, and professional interactions, including responding to periodic financial planning questions and service requests from clients.
- Maintain organized, complete, and accurate documentation of all client meetings and interactions in client files, planning software and Client Relationship Management (CRM) software.
- Work closely with other team members to provide the best possible client experience, including timely assignment of client follow-up "tasks," soliciting advice and feedback from other team members and providing expertise as needed to other team members.
- Interact with prospects and sources of new business, including attorneys, accountants, and other centers of influence.
- Prepare and deliver presentations on financial planning or investment-related topics as opportunities arise.
- Participate in continuing education courses to maintain professional credentials and effectively perform duties of position.
- Other duties, as needed.

Broadview offers a competitive pay and benefits package, including a salary, discretionary bonus, health, dental, disability, life insurance, 401(k) and paid time off. To learn more about our financial planning services, visit www.BoadviewFinancial.com.

To be considered for this important role, please submit your resume to angie@broadviewfinancial.com.