

Full Time Position of Senior Financial Planner - Pleasanton, CA (Immediate Opening)

Job Description: A fast growing SEC registered investment advisory firm (RIA) is seeking to add a new experienced financial planner to join our dynamic team. The successful candidate will support the principal of financial advisory firm servicing client relationships and working on various analysis & planning projects while documenting and communicating recommendations with prospects and clients. He/she will be an integral part of financial planning team and investment committee.

Responsibilities:

- As a lead planner responsible for all aspects of the client's financial plan strategies and outcomes
- Provide objective, unbiased financial advice to a diverse clientele by analyzing client needs and associated investment opportunities.
- Client relationship development and management, including ongoing and regular client contact and communications.
- Create comprehensive financial plans and investment strategies (e.g. retirement planning, stock options analysis, education funding, tax and estate planning, insurance needs analysis)
- Client planning updates, portfolio changes and reviews, and new opportunity identification.
- Research investment models and opportunities, maintain financial planning platforms
- Manage lesser experienced professionals and inform team members of all client matters
- Assist in business development activities, such as designing marketing strategy, making presentation, hosting podcast & contacting prospects
- Cross-sells firm's services and deepens existing client relationships by engaging various social events

Qualifications:

- 5+ years of experience in financial planning field with demonstrated ability to develop plans and manage client relationships
- Bachelor's degree and CFP® (Certified Financial Planner) designation is a must

- Proficiency in Microsoft Office; experience with various financial planning platforms (e.g. eMoney & Orion), CRM (Redtail), and portfolio management software.
- An enthusiastic, pro-active and client service-oriented attitude
- A self-starter who can work independently
- Excellent verbal and written communication skills
- Strong analytical skills and ability to focus on details
- Organized, flexible, efficient, reliable, positive & eager to learn
- Good entrepreneur skills including leadership, management, creative thinking and problem-solving

Compensation: Competitive base salary (\$100k-\$150K) plus revenue sharing payout

Benefits: 401(k) & Profit-Sharing plan, health care and dental plan

Interested candidates - please send your resume with a cover letter to info@sierrapfa.com