

Financial Planner Sorrento Valley/San Diego

This is a unique career opportunity for a financial planner. Office located in San Diego. We work with clients both locally and nationally. Our company is also nationally known for its specialty planning. We are an independent fee-only financial planning office.

This is for someone looking for a long term career opportunity with growth potential.

We have a great family-owned office with a comfortable, yet professional atmosphere. We provide comprehensive financial planning services both in person to local clients and remotely over the internet to clients out of the area. We are looking for someone who can take the initiative and work both independently and as part of a small team.

Candidate requirements:

- Designation or license to provide advisory services (such as CFP, CPA, Series 65, 66, etc.) and actual planning experience.
- Series 7 license a plus.
- A good understanding of investment and financial planning and willing to grow your knowledge.
- Experience in preparing written financial plans, extracting data from client financial documents, portfolio analysis, and investment analysis.
- Experience in using financial planning software.
- Excellent computer skills.
- Excellent proficiency in using the internet.
- Understanding of Microsoft Office including Word, Excel and Outlook.
- Excellent communications and interpersonal skills.
- Team player, excellent people and organizational skills, detail oriented.
- A positive, entrepreneurial attitude and willing to learn and grow.

Great working conditions with benefits package and compensation based on experience and ability to add value.

Please email your resume with salary history/requirements to dankantor123@gmail.com

All information will be kept confidential.