

Assistant to Financial Planner - Part Time (UTC/Governor)

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Retirement & Tax Solutions assists high net worth clients in San Diego with their financial planning needs. We are an established and growing financial planning firm adding new clients and advisors to the firm. In addition to financial planning, the firm helps clients with home loans, real estate, life and health insurance.

We are looking for a person who is eager to learn and comfortable working both independently and as part of a team. The right person has a positive attitude, is highly motivated, detail oriented and possesses excellent communication skills.

Responsibilities will include:

- General office management
- Scheduling quarterly client appointments
- Setting up quarterly client workshops/seminars
- Managing advisor's calendar
- Maintaining the company filing system
- Managing compliance records for advisors in branch
- Effectively answering and handling incoming client service calls and emails
- Opening accounts
- Assist advisor in day-to-day operations
- Assist with preparation of marketing materials

Desired Skills:

- Proficiency in Microsoft Word, Excel and Outlook. Knowledge of ACT is a plus
- Excellent telephone presence while handling business, client service and accounting calls
- Strong writing skills. Ability to respond and effectively communicate with customers, vendors and dealers via email or letter
- Able to work independently and/or as a team on various projects
- Experience in the financial services industry, especially in the broker/dealer industry a plus. Having your series 7 & 66 a plus as well
- Reliable and positive work ethic
- Strong organizational skills and ability to multi-task
- Willingness to learn
- Ability to take charge with little guidance
- Minimum 2-3 years of working in an office environment
- Willingness to work as an independent contractor a plus

Compensation:

- Starting pay \$12-15 per hour depending on experience

The hours needed would be:

- Two to three days a week, 9am-3pm. (Days of the week and hours are flexible)

Please send resumes and available hours by email or fax to 858-761-0283. Our hours of operation are M-F 6am-5:00pm.