CFP - Planning Officer (Non Sales)

CFP *Planning Officer* (Non-Sales) in an established (28 years) and growing boutique financial life planning/wealth management firm providing an elite group of high-net-worth clientele with family office services.

The *Planning Officer* is an experienced, interdependent professional responsible for producing plans and tracking all aspects of each client family's wealth utilizing the firm's industry leading proprietary process.

The *Planning Officer* works closely with one or more Lead Planning Officers and staff members; client family members; and the client families' other advisors, as a pivotal mem ber of each family's unique advisory team.

- CFP, Series 7, Life Insurance and five years actual planning experience
- Team player, excellent people and organizational skills, detail oriented
- Analyzes and resolves a variety of financial life planning situations
- Understands financial services and products and non-product investments
- Oversees firm compliance and due diligence
- Proficient with IT, the internet, MS Office and financial services software
- A positive, entrepreneurial attitude willing to learn and grow

Superior working conditions, full benefits package, profit sharing and bonus compensation based on experience and the ability to add value.

Forward resume to cfpnonsales@gmail.com