Financial Planning Specialist
Position Description

Who we are:

JV Financial Group is a team of highly qualified and experienced financial planning professionals. We provide comprehensive wealth management services to successful professionals, business owners, and their families.

Our team is dedicated to collaborating closely with our clients' other professional advisors to deliver exceptional investment, tax, estate, retirement, insurance, and succession planning strategies tailored to each family's life goals and values.

We are expanding our team by adding a Financial Planning Specialist. Working in cooperation with the Partners, the Financial Planning Specialist is a key provider of excellent financial planning advice and client service.

We aim to offer a collaborative and inclusive environment that encourages productivity, personal growth and new skill development.

Who you are:

You are an experienced financial planner committed to putting clients' best interests first, providing exceptional service and building long-term relationships.

What you bring:

- 5+ years' experience managing client relationships
- 5+ years' experience building, implementing and maintaining financial plans for clients
- Certified Financial Planner designation
- Excellent written communication skills
- Attention to detail and multi-tasking skills
- Client service and relationship development skills
- Advanced knowledge of technology, tools and software

What you will be doing:

1. **Financial Planning**
   - Prepare and distribute supporting information for scheduled client meetings (i.e., agendas, updated portfolio summaries, etc.).
   - Conduct client meetings with and without a Partner.
   - Gather and input client data, goals and expectations.
   - Use planning software and professional judgement to assess clients' retirement projections, life and disability insurance needs.
   - Prepare potential solutions and draft proposals, concepts and presentations.
   - Present financial plan with or without a Partner.

2. **Investment Services**
   - Track and analyze investment products, assisting Partners in the selection of investment funds and managers.
   - Formulate investment recommendations based on client objectives, risk tolerance and target asset allocation.
   - Review Client Portfolios and advise when changes may need to be made.
   - Create meeting notes as they pertain to Investments and determine actions to be taken and target dates.
   - Provide day-to-day support to clients.

3. **Client Service and Client Relationship Management (CRM)**
   - Initiate, manage and conduct proactive and professional contact with existing clients.
   - Professionally respond & assist clients who inquire with phone calls and/or e-mail by creating and maintaining a high touch experience – create a great rapport.
   - Keep CRM up to date with meeting notes, phone conversations, actions taken, etc.
   - Touch base with clients as needed, usually 6 months after last meeting.

4. **Support other Team Members**
   - Offer support and assist other team members, especially during busy seasons.
   - Assist Partners with any tasks that are within knowledge base and skill set.

Salary – $120,000 - $150,000 total compensation (base salary plus bonus potential)

Please note that Kim Poulin of The Personal Coach is assisting us with the hiring process.