FINANCIAL PLANNING

Financial Planning Case Writer

Job Location: Boston, MA

BAYSTATE FINANCIAL

Reports to: Co-Director(s) of Financial Planning

SUMMARY OF RESPONSIBILITIES: *Primary responsibility is to design and create customized recommendations and strategies for financial plans for individuals and business owners.*

PRINCIPAL RESPONSIBILITIES:

- Knowledge of financial planning software to enter data, model strategies and recommendations, calculate solutions, and creatively explore options to implement comprehensive and situational plans in strict time constraints.
- Responsible for inputting and modeling data and developing actionable client centric financial plans. Also, may coordinate with, or partner with the paraplanners as it relates to data entry.
- Understanding and experience on the needs and tax/planning issues that affect high net worth individuals and business owners.
- Manage accumulation of advice and strategies from Specialists within the office.
- Prepare correspondence and track financial plan progress.
- Provide meeting support to financial planners as needed (including potential travel).
- Draft customized recommendations relating to high net worth individuals, business owners, business succession planning, special needs planning and more.
- Promote the financial planning value proposition to the firm.
- Obtaining and maintaining licensing, registration, continuing education and financial planning requirements.

KNOWLEDGE/SKILLS/COMPETENCIES REQUIRED:

- Proficient understanding of the financial planning process
- Ability to work independently while impacting team results
- Excellent communication skills
- Outstanding writing and research skills
- Highly organized to meet concurrent project deadlines
- Ability to travel within the Boston area as needed (must have own car)

KNOWLEDGE/SKILLS/COMPETENCIES PREFERRED:

- Experience preparing financial plans
- FINRA Series 7 and 66 (or 63 and 65) licensed required (or to be obtained within the first 3 months of employment)
- Knowledge of eMoney Advisor software *a plus*
- CFP® designation or working towards CFP® designation *preferred*