



Description

Established Metrowest Registered Investment Advisory Firm seeks a Director of Financial Planning. This is a new position within the firm and offers the opportunity to make a significant impact.

Responsibilities

- Create and standardize our Financial Planning process and offering
- Chair the Financial Planning Committee
- Create and manage Financial Planning content on website and blog
- Build and present financial plans for existing and prospective clients of the Firm
- Train new employees on Financial Planning processes
- Present weekly on relevant topics to the Financial Planning and Investment Committees
- Stay abreast of industry and legislative changes and developments
- Involvement in certain COI relationships

Requirements

Skills

- Strong communication and presentation skills
- Ability to effectively run a meeting
- Strong team management skills

Education, Training & Experience

- Certified Financial Planner™
- Relevant, extensive industry Financial Planning experience (10+ years)
- Familiarity with Financial Planning software (MGP, Holistiplan, eMoney, etc.)
- Preference given to additional designations such as CPA, JD

Job Type: Full time, WFH flexible

Benefits: 401(k), health insurance, dental insurance, vision insurance, disability insurance, flexible spending account(s), health savings account, life insurance, employee assistance program, paid time off, parental leave, WFH flexible and more.

[Click here to apply for the Director of Financial Planning position through Grimes & Company's internal website](#)