

Associate Financial Planner

At Briaud Financial Advisors, we pride ourselves on our culture of continuous growth, integrity, teamwork, and professionalism. We are seeking an Associate Financial Planner who wants to add to that culture through their attention to detail and dedication to taking care of clients' needs. This role supports our Financial Planners, and our ideal candidate is someone with a desire to grow into a Financial Planner role in our organization as well.

This position is well-suited for you if you thrive in a fast-paced environment and are looking to learn financial planning from some of the best in the industry.

In this role you will:

- Contribute to the development and implementation of financial plans for clients
- Develop retirement projections, income tax projections and estimates, risk management analyses, and estate plans with subsequent recommendations
- Support our Financial Planners and Advisors through financial planning research unique to each client
- Serve clients by assisting with account establishment, money movement, and other client requests.

If you have the following, we want to talk to you:

- **A passion for financial planning** — Whether your passion is budding or full-flamed, you can't help but feel compelled to work in this industry.
- **Extreme level of detail** — You see and care about the little things that others overlook.
- **Superior conceptual and problem-solving skills** — Solutions come naturally to you and you aren't afraid to think outside the box or look for unconventional answers. And if you don't know the answer, you go and find it.
- **Excellent communication skills** — You keep others in the loop on what's going on and are proactive in updating those you work with.
- **Humble spirit** — You know the areas you need to grow in professionally and you embrace constructive criticism to help get you where you want to be. You strive each day to be a little bit better than before.



- **Demonstrated excellence** — You have excelled in academia, athletics, or maybe you are just really nerdy about a particular hobby. Whatever the area may be, you excel in it.

Required Qualifications:

- CERTIFIED FINANCIAL PLANNER™ designation or enrolled in a CFP® program
- Bachelor's degree with work experience
- Working knowledge of Microsoft Office including Excel, Word, PowerPoint, etc.

Briaud Benefits Include:

- Ten paid company holidays along with three weeks of paid leave
- Flex Time
- 401(k) with employer matching
- Continuing Education – paid professional dues, conference attendance, and training

Salary is commensurate with experience and qualifications. Note, we do not sell financial products and business development is not required for this role.

About Briaud:

"Briaud delivers financial security to some of the smartest people in the world."

What started as a passionate interest has grown into arguably the best Fee-Only Financial Planning firm in the country. Briaud Financial Advisors specializes in working with the university professionals and their families providing a holistic financial planning experience. Described within the industry as a *"white glove service"*, Briaud utilizes a deep bench of expertise, leveraging decades of experience to help clients meet their long-term financial goals.

Briaud is a lower volatility-seeking firm with an emphasis on steady returns. Advising just under \$700M in assets, Briaud executes a Top-down Macro-driven investment process to manage the portfolios under advisement. Investments utilized with this process include ETF'S, Mutual Funds, and individual Fixed-Income securities.