CENTINEL
FINANCIAL GROUP, LLC

Job Title: Financial Advisor/Planner
Location: Needham Heights, MA or Wakefield, MA
Employment Type: Full-Time
Compensation: Commensurate with experience
Reports To: Senior Advisor/Planner within the team

Job Summary:

We are seeking a skilled and trustworthy **Financial Planner** to provide expert advice and personalized financial strategies. The ideal candidate will help clients clarify financial goals, assess current financial situations, and develop plans to achieve long-term success. This role requires both analytical ability and strong interpersonal skills to build lasting client relationships.

Key Responsibilities:

- Work with clients to evaluate their financial needs, goals, and risk tolerance
- Develop and implement tailored financial plans covering investments, retirement, tax planning, estate planning, insurance, and budgeting
- Monitor financial plans and update them based on changes in the client's goals or economic conditions
- Provide advice on a broad range of financial products and services
- Maintain up-to-date knowledge of financial regulations, products, and market conditions
- Educate clients on financial options and assist in decision-making
- Ensure all client documentation is accurate, compliant, and confidential
- Collaborate with accountants, attorneys, and other professionals when needed

Qualifications:

- Bachelor's degree in Finance, Accounting, Economics, or a related field
- Certified Financial Planner (CFP®) designation strongly preferred
- 5+ years of experience in financial planning or advisory services
- In-depth knowledge of investment strategies, insurance, tax laws, and estate planning
- Excellent communication and interpersonal skills
- Strong analytical and organizational abilities
- Proficiency with financial planning software (e.g., eMoney, MoneyGuidePro, or similar)

Preferred Traits:

- Integrity and fiduciary mindset
- Ability to simplify complex financial concepts
- Detail-oriented with strong follow-through
- Passion for helping clients achieve financial independence

How to Apply:

Please submit your resume and a brief cover letter explaining your approach to financial planning and why you'd be a great fit for this role. Include examples of previous planning scenarios if possible.

Julie A. Patterson
Partner

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