

# Clintzman Financial Planning

## Southlake, Texas

**Full Time Position Available:** Financial Planner

### **Company Background**

Clintzman Financial Planning is a locally owned and based comprehensive financial planning practice which currently has three financial planners and one Office Assistant. We are a Fee-Only practice, offering hourly or Asset Under Management services to clients of diverse wealth and income levels. We were founded in 2002, and our team has a combined experience of over 35 years. Our current employees are of the highest talents, and we are proud of our family-oriented culture. We have been blessed with tremendous growth, and expect this to continue as more consumers see the benefits of separating the planning process from product implementation. We are passionate about helping clients reach their financial goals.

### **Job Description**

We are looking for a qualified individual to prepare delivery-ready financial plans and periodic reviews for client presentation by our two senior level CFP® practitioners. Success in this task will ultimately lead to the candidate personally presenting financial plans to clients. The candidate will work closely with other members of our team, making teamwork and communication skills critical. Frequent client contact will also be a major part of this position. The ideal candidate will require minimal supervision, possess the ability to explain financial concepts in layman's terms, and be able to convince a client of the right thing to do in certain situations. Business development is not initially a required attribute. This position includes excellent growth opportunities for an ambitious candidate.

### **Candidate Requirements**

- High degree of personal integrity, morals, and honesty
- Bachelors degree
- At least 4-5 years experience creating and working with financial plans
- Certified Financial Planner™ certification or candidacy
- Ability to identify planning issues and propose solutions
- Prepare financial planning documents, including retirement projections, investment allocation schedules, insurance and estate planning summaries, education funding strategies, and budgeting/cash flow models
- Refined written and verbal communication skills
- Strong problem solving and analytical skills
- Self-motivated and ability to take ownership of work, seeing project through to completion
- Detail oriented and a strong attention to accuracy
- Proficient computer skills in MS Office and Internet Explorer

**Candidate Preferences**

- Bachelors degree in Financial Planning
- Previous experience in a Fee-Only financial planning environment
- The ability to educate and motivate clients
- Ability to listen “between” client’s words for their true questions or fears
- Flexibility and a dedication to help our entire team be successful
- Knowledge of Junxure-i CRM software
- Knowledge of MoneyGuide Pro software
- Confidence and Compassion
- Demonstration of a commitment to the profession, including a history of continuing education and learning

**Compensation:** Competitive salary and benefits, commensurate with experience

**To Apply:** email or fax cover letter, resume, and salary history to [bryan@ClintzmanFinancialPlanning.com](mailto:bryan@ClintzmanFinancialPlanning.com) or 817-410-8288