

# CAREER OPPORTUNITY

**Position:** Financial Planner

**Availability:** Immediate and Full-Time

## **Position Description:**

This position is a tremendous opportunity to work for a fee-only financial advisory firm, which serves a growing base of high net worth clients. The successful candidate will be involved in all aspects of the client advisory relationship including: personal consultation, financial plan design, implementation, annual reviews, and coordination of financially related issues with the clients' other advisors (CPA's, attorneys, etc.). This individual will work along with and learn from the founder of the firm and the other planner in the office. There are no sales or business development responsibilities in this position.

## **Qualifications:**

- CFP candidate or designee
- Solid computer skills, working knowledge of planning software such as Naviplan is a plus
- The ability to work confidently with high net worth clients a must
- Excellent writing and communication skills
- Strong analytical and organizational skills with a strict attention to accuracy and exceptionally detail-oriented
- Ability to work effectively both independently as well as part of a team in a small organization

## **Company Description:**

PartnersInWealth ([www.partnersinwealth.com](http://www.partnersinwealth.com)) is an innovative fee-only financial advisory firm that is passionate about helping high net worth families accelerate the growth of their net worth. Founded in 1992, we are a 4-person office with a client-centered, team-orientated approach located in the heart of Houston, Texas.

**Compensation:** Competitive salary and comprehensive benefits program

**Apply:** Email or fax your resume and salary requirements to [info@partnersinwealth.com](mailto:info@partnersinwealth.com) or (713) 963-2977