

Financial Advisor

Abacus Planning Group is a fee only financial planning firm with a holistic approach to serving our clients. We are looking for an experienced individual to become a Financial Advisor who is dedicated to helping our clients make smart financial decisions.

Duties and Responsibilities

Financial Advisors are an integral member of the client service team and work directly for Abacus clients. Superior client service is a guiding principle; common responsibilities include—

- Assist lead financial advisors and principals in generating holistic financial plans and meeting preparation
- Assist in the implementation of financial plans, including the generation of required custodian paperwork
- Assist with onboarding new clients
- Develop relationships with allied professionals and strategic partners, interact effectively with the media (print, radio, and TV), and create and complete a personal marketing plan
- Assist clients in the implementation of all aspects of financial plans
- Build relationships with clients through active listening
- Review of client financial plans regularly
- Proactively assess planning issues for clients
- Complete special projects related to financial planning

Qualifications

Abacus Financial Advisors typically possess the following qualifications—

- Bachelor's Degree or higher
- Five to seven years of post-college experience developing a refined business acumen
- High EQ (emotional quotient)
- Certified Financial Planner® professional or are working on obtaining
- CPA, EA, MBA, JD a plus (but not required)
- Collaborative and able to work effectively with others
- Ability to manage multiple demands of you which will on occasion exceed the amount of time available
- Strong communication skills, including a mastery of English grammar
- Proficiency in using common office technologies, plus the agility to quickly learn new technologies as they become available

Working at Abacus

Abacus is a unique firm with a unique working environment.

- The Abacus Cultural Norms are—
 - Listen, and then listen
 - Keep a beginner's mind
 - Embrace change
 - Seek mastery
 - Practice gratitude
 - Commit to radical responsibility
 - Honor the sanctity of confidentiality
 - Remember "it's not about you"
 - Create energy not time
 - Celebrate
- A defined Leadership Pipeline structured so employees know their necessary competency areas, skills required, and work values at each stage of development. In addition, we define the support Abacus will provide as you progress through the Leadership Pipeline.
- A salary commensurate with experience and abilities. Benefits include health insurance, a profit-sharing plan along with several others creating a broad package of employee benefits.

If you are interested, please send a cover letter and your resume to Marc McQueen at marc@abacusplanninggroup.com