Financial Planning Specialist

Position Description

The Nelson Team at Focus Financial is seeking a Financial Planning Specialist for our wealth management team in Minneapolis, MN. Our new *Residency and Intrapreneurship Program* seeks to combine the learning benefits of a residency program, the advancement of a career track program, and the freedom of launching your own start up. This opportunity comes with the ability to earn ownership in your future client relationships, which is the necessary condition to truly be an independent business owner in this industry. This opportunity does *not* come with the expectation of developing new business, as you will be introduced to your future clients at the completion of your Residency phase.

This is the ideal opportunity for someone who has a strong intent of becoming a financial advisor or someone that has experience in that role, but would like a better start in the business with the support of an established team behind you.

We are especially interested in you if you like the idea of working on cutting edge financial planning techniques, developing outside-of-the-box solutions to financial issues, continually growing your financial planning knowledge, and appreciate the opportunity to make a meaningful impact to clients' lives as a result of your work and ideas.

Challenging tasks you get to do:

- Participate in developing recommendations, agendas, and analysis in preparation for client meetings.
- Help implement and proactively follow up on meeting action items.
- Collaborate with accounting, legal, banking, insurance, and other strategic advisors for meeting preparation and follow up action items.
- Responsible for overall financial planning work flow and implementation schedule.
- Maintain and organize client details in several software systems.
- Support the process of developing financial plans, developing asset allocations, executing trades, and managing account reporting.
- Participate in discussion and share ideas for delivering more value to clients, improving the client experience, and increasing team efficiency.
- Have a material impact on the clients we serve by helping us care for our clients and deliver an elite client experience that is always improving.

Valuable things you will learn:

- How to identify and communicate planning opportunities.
- How to methodically research new planning areas to discover fresh opportunities.
- How to approach the investment management process and implement trading activity.
- How to run a client meeting to prepare you for transition to financial advisor.
- How to efficiently manage a wealth management practice.
- Various software systems and their role in delivering service to clients:
  - Schwab Advisor Center
  - eMoney
  - Redtail
  - Albridge OneView
  - TradeWarrior
  - MindJet
  - Riskalyze

Matthew Nelson, CFP® | FINANCIAL ADVISOR
1000 Shelard Parkway, Suite 404, Minneapolis, MN 55416
952-225-0343 direct | 952- 525-8538 fax | 952-591-9770 main
www.nelson-focusfinancial.co m

Financial Planning Specialist

Desired Qualifications and Characteristics

- Bachelor's degree from accredited university.
- Pursuing financial designation (CFP®, CPA®, CFA, CPWA) and/or 2-3 years of experience.
- Possesses a "no task is beneath me attitude".
- Superior problem solving skills.
- Intellectually curious and a quick learner.
- Detail-oriented, but capable of swiftly completing projects with adequate assumptions

Career Track, Compensation, and Other Benefits

- Agreements detailing transition of clients at completion of residency and pathway to ownership are put in writing.
- Competitive and innovative compensation package; full-time base salary commensurate with experience.
- Personal mentorship by team advisors including weekly mentorship meetings.
- Self-managed professional development budget for use towards designations, conferences, industry events, membership dues, and continued training.
- 401(k) Plan with attractive company match that is 100% vested.
- Company-subsidized medical, dental, short-term and long-term disability benefits
- Flexible paid time off with company paid holidays.
- Relocation assistance available for a hire outside the Minneapolis metro.

How to apply:
Submit resume and cover letter to: careers@focusfinancial.com.

About The Nelson Team at Focus Financial

The Nelson Team is a growing wealth management practice at Focus Financial. We seek to build and preserve wealth for our clients. Through client-specific financial analysis and investment research, our services are designed to help guide clients towards their long-term financial goals. Led by Matthew Nelson, CFP®, and through our affiliation with Focus Financial, a registered investment advisor headquartered in the Twin Cities, Minn., since 1993, we can provide independent, client-focused advice to our clients using the systems, tools, and produce we determine to be the best fit for each individual client.

Matthew Nelson, CFP® | FINANCIAL ADVISOR
1000 Shelard Parkway, Suite 404, Minneapolis, MN 55416
952-225-0343 direct | 952- 525-8538 fax | 952-591-9770 main
www.nelson-focusfinancial.co m