SYM FINANCIAL ADVISORS

Position Description

Title:	**Financial Planner**
Reports to:	Keith Beers – Manager of Financial Planners
Benefits:	Yes
Status:	Exempt

Are you seeking to join a team of professionals who are passionate about instilling confidence in the financial lives of others?

Who is SYM?

SYM Financial Advisors serves as a trusted expert to our clients, using our team's deep knowledge and vast experiences to be an advocate and help them achieve their vision of financial success. Always acting as an independent fiduciary, we are committed to acting in the client's best interest. We provide our clients with holistic financial guidance providing customized and comprehensive financial plans. This position is best for a candidate who seeks to sharpen technical competency before advancing toward a client-facing advisor role or who is pursuing the various career paths of a Financial Planner.

To help you reach your full potential, SYM encourages the professional growth and personal development of all employees by offering pathways to advancement. Our training model consists of a mixture of delivery methods including a Learning Management System consisting of self-guided module training through videos, written, and in-person instruction. We recognize there is more in life than work, so we also support family commitments and encourage community involvement.

To learn more about our company, visit this link: SYM Financial. Who We Are. (youtube.com).

What does this role entail?

The Financial Planner assists Advisors in collecting, reviewing, and analyzing comprehensive financial planning modules utilizing various software and proprietary methods. In this role, you will be paired with a team of 1-2 advisors and a Client Service Representative to support an assigned client book. Primary responsibilities include but are not limited to:

- Supporting advisors through all stages of planning: preparation, updating, delivery, and implementation of financial plans based on the evolution of a client's financial situation
- Keeping current on financial planning topics including, but not limited to, estate planning, complex retirement needs, Social Security, education planning, and tax planning.
- Assisting advisors by preparing for meetings, developing presentation materials, providing reviews, and following up on action items
- Collaborating with other internal groups and external resources to develop client

strategies that incorporate relevant and specific recommendations for each client

- Using exceptional analytical and relationship management skills to uncover client's needs and recommend the appropriate solution to meet those needs

What are we looking for?

Must Haves:

- You have earned at minimum a bachelor's degree from an accredited college or university
- You have robust PC knowledge, typing skills, and proficiency in Microsoft Office Suite
- You possess excellent written, verbal, and analytical skills and communicate with a professional demeanor
- You are reliable, detail-oriented, and able to maintain a high level of confidentiality
- You are able to work independently while managing and prioritizing deliverables
- You are a self-starter, highly motivated, adaptive, and able to handle multiple priorities in a fast-paced environment

Preferred:

- You have 2+ years of experience in the financial services industry
- You have a bachelor's degree in Finance, Accounting or Personal Financial Planning
- You have a strong desire to attain or retain Certified Financial Planner credential
- You have experience working with a Client Relationship Management (CRM) and financial planning software (Money Guide Pro or eMoney)
- You have the desire/ability to work successfully in a small company environment

What's in it for you?

- Competitive pay based on experience plus incentive compensation
- Health Care, Vision, Dental/Orthodontic, Life, and LTD Insurance
- 401(k); 6% Match
- Paid Time Off / Parental Leave / Family Time Off / Volunteer Time Off
- Option for Pet Insurance / Fitness Match / Apparel Allowance
- Tuition / Certification Assistance Program
- A defined career framework to help you successfully manage your career goals.