COLUMBIA PACIFIC WEALTH MANAGEMENT

Planner:

The Planner works in a client-focused, team-centered environment assisting the advisory team with all aspects of financial planning and analysis for the firm's clients. As a Planner, you will be expected to drive many of the planning focused projects and analysis for the firm's clients.

Essential Job Functions for the Planner include:

- Build a foundational understanding of industry and concepts related to planning, investments, insurance and financial markets.
- Demonstrate ability to complete straightforward financial planning analysis and projects independently
- Demonstrate ability to gather appropriate data and client information for plan development
- Become an expert with eMoney Advisors financial planning software and be able to quickly and accurately update and revise financial plans based on feedback from advisors and clients
- Supports ongoing portfolio monitoring and account maintenance and proactively identifies action items
- Becomes familiar with insurance products/solutions and what role they play within a client's long term financial plan
- Understands firm's wealth management process
- Prepares efficient and thorough analysis required to developed a proposed financial plan or investment portfolio
- Prepares trades when rebalancing or cash needs are required
- Provides prompt follow-up to client meetings when applicable, completing action items with direction from advisor
- Demonstrates ability to support advisors by completing Salesforce tasks and processes effectively and efficiently
- Acts as back-up to Manager on clients, assisting with client requests that fall outside of regular reviews
- Effectively utilizes Salesforce to ensure client information is up-to-date and coordinated among client service team
- Understands and effectively utilizes internal and external resources
- Provides meaningful support in development of analysis for new client proposals
- Proactively looking for additional planning opportunities for existing clients

Required Knowledge, Skills, and Abilities

- Bachelor's degree from an accredited institution
- Candidate for CFP® certification or other financial services industry credential
- Series 65 license
- Minimum of 3 years' experience
- Customer service background preferred
- Excellent verbal, written, analytical, and organizational skills
- Ability to identify, meet and follow through with client needs and request
- Must be a goal-oriented team player with a 'no job is beneath me' attitude
- Community service driven and charitably minded
- Able to work independently
- Enjoy being part of a team
- Above average knowledge of Microsoft Excel and Word
- Must be highly flexible and confidential with all client and firm matters