



## **Financial Advisor/Planner**

CAP Partners is a boutique financial planning and advisory firm whose commitment to our clients is to help them pursue their life goals with consistent planning, wise investing, and strong team support. We extend this same approach to our team where we value balance for our team with support for their financial, spiritual and family life. We offer work-life integration, competitive pay, and opportunities to grow professionally.

### **Position Summary**

This Financial Advisor position will have a planning focus. You will develop and build client relationships with the support of experienced financial professionals with years of industry experience. In addition to cultivating your own book, advisors within the team will help to add to the success of an incoming advisor.

### **Qualifications**

#### *Type of candidate*

- Self-starter with an entrepreneurial spirit.
- Strong interpersonal aptitude.
- Comprehensive knowledge of topics related to financial planning.
- In-depth understanding of the securities industry, including investment and insurance products and services.
- Exemplary written and verbal communication skills.
- Results-oriented mindset.
- Experience with financial planning software (eMoney, MoneyGuidePro)

#### *Preferred Education and Experience*

- Securities License for Investment Advisors (Series 65)
- 4 year degree or equivalent experience
- 3+ years experience in the financial industry
- CFP, CPA, or other finance related designations

**Duties & Responsibilities:**

- Manage and build strong client relationships.
- Provide financial planning and investment advisory services.
- Research and present investment strategies.
- Develop and execute retirement planning.
- Implement risk management and tax planning strategies.
- Coordinate estate planning with the overall plan.
- Develop and grow a book of business.

**Position Details**

- Full-time position.
- Estimated \$75k - \$100k total compensation range by the end of the first year.