

Financial Planner

About the Job

CFP – Certified Financial Planner

CapTrust Advisors, LLC is an independent financial advisory firm located in Tampa Florida. Our firm currently manages assets approaching ten billion dollars in fee based and brokerage based accounts. Our wealth management division is currently looking to fill a Certified Financial Planner position and will report to the Managing Principal. The CFP will be an integral member of our Client Service Center team and be responsible for:

- Preparing, presenting and implementing customized comprehensive financial plans and portfolios
- Providing financial planning services and technical advice to clients in all areas, including investment planning, insurance planning, tax planning, retirement planning, and education planning
- Developing, managing, and retaining client relationships
- Coaching clients regarding planning options/products
- Directing and overseeing the data entry and plan production for client planning matters
- Conducting client reviews
- Following up with clients, relationship managers, other departments, and outside advisors on outstanding transactions
- Submitting and tracking processes in database

The ideal candidate must be technically proficient in developing customized financial plans, and have experience working directly with high net worth clients, and also possess:

- strong organization, prioritization, and time management skills
- strong mathematical, analytical, verbal & written communication abilities & listening skills
- the ability to understand, apply and communicate complex financial planning concepts based on a client's situation
- client first attitude

- **computer knowledge specifically Microsoft Office Suite and database management programs**

Candidates must have a college degree with at least 3 years financial services experience. Current licensing required: CFP, Series 6 or 7, 63, 65, and Life & Health Insurance licenses.

In addition to a competitive base salary, employees receive a benefits package that includes: health insurance, life insurance, disability insurance, and a 401(k)/profit-sharing plan.

CapTrust Advisors is the largest independent firm in the State of Florida. We can offer you an exciting, fast-paced working environment, a culture of mutual respect, commitment to maintaining the highest ethical standards and the opportunity to play a vital role in our growth. If you are attracted to joining an organization where every individual's contribution counts and where your talent will have an impact on our future, please send in your resume (including salary requirements) for consideration to: penny.diedrick@captrust.com

More information on CapTrust can be found on our website at www.captrustadv.com.