

# Financial Planner Job Description

www.GoddardFinancialPlanning.com



## Current Opportunity

Goddard Financial Planning is a growing financial planning firm with 14 years of continual growth. Our mission is to simplify the lives of our clients and their families by delivering financial plans and investment advice they need, at the intervals they choose, with transparent pricing.

This planner will work with individuals and couples, acting as their guide to achieve their short-term and long-term financial goals. Financial plans cover areas related to household cash flow, establishing savings goals, distribution planning during retirement, asset management and investment decisions.

We are expanding into a new office and looking for a financial planner who is interested in joining our team to learn and contribute to our hourly, fee-only model.

## Responsibilities

1. This position will work with both new and existing clients gathering financial information and discussing the client's goals and objectives. The planner would analyze the client's situation overall and in detail, to determine the best course of action for the client to develop a sustainable approach to reaching their goals.
2. An experienced planner typically works with a group of about 120 clients with varying degrees of financial complexity.
3. The planner will prepare broad-based financial plans for clients using a variety of tools, skills and software to create the client's initial plan. These include:
  - Retirement Planning Software, Morningstar and Tax Planning Software.
  - Knowledge of Investment Vehicles (generally index funds) and ability to structure an investment portfolio in alignment with client's comfort with risk.
  - Ability to prepare Excel based worksheets to communicate client's financial position related to Cash Flow and Liquid Assets.
4. The planner will play an active role in helping with business growth and improving internal processes. Planners participate in a wide variety of collaborative events to help maintain efficient day-to-day operations, continual knowledge building and long-term strategic planning.

## Qualifications, Knowledge, Abilities

- Must hold and maintain CERTIFIED FINANCIAL PLANNER™ Professional designation.
- A degree is a requirement of the Certified Financial Planner Board of Standards. A bachelor's degree in Accounting, Business or similar field that requires analytical ability is preferred.
- Able to be empathetic and compassionate in working with a wide range of clients with differing financial goals and situations.
- Must have excellent communication and interpersonal skills to work in this people-oriented business.
- Interest in long term ownership opportunities is a plus.

Forward your cover letter and resume to [info@goddardfinancialplanning.com](mailto:info@goddardfinancialplanning.com).  
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