

We are hiring!

Financial Planning Analyst

Arlington Heights, IL



OPPORTUNITY SNAPSHOT

Gain broad exposure while building a career home at a stable, growing firm serving diverse clients. If you combine strong analytical skills with solid customer-facing interpersonal skills, this position offers you several compelling opportunities. You will:

- Gain valuable experience that can **help you obtain your Certified Financial Planner designation**, if you don't already have it.
- Take your financial planning career to the next level -- we'll seed you with clients and help you develop the skills and experience you need to become a Wealth Manager.
- **Expand your skills** in both analysis and client interaction, two key skills we look for when advancement opportunities come up.
- Earn a **competitive salary and great benefits**, including support for continuing education and certification.

REQUIREMENTS

To be a good fit for the Financial Planning Analyst opportunity you will have:

- Formal Education in OR 2 to 4 years of experience specific to personal financial planning
- Solid Analytical skills, demonstrated in financial planning (ideally), taxes, insurance and/or employee benefits.
- A CFP certification is preferred.
- Excellent proficiency in MS Word and Excel.
- Strong technical acumen and computer proficiency.
- Familiarity with industry specific financial planning software. Knowledge and familiarity in Right Capital, Morningstar, Junxure , Worldox is ideal.
- Demonstrated skills in collaboration and team interaction.
- The ability to create mature and focused written communication as well as strong, clear, warm and concise verbal engagement.
- A heart to serve,

THE ROLE

We will assign you to work with a Wealth Manager as a primary connection, but you also will support others. The position involves three key responsibilities,

- Engaging with clients to obtain data and answer questions.
- Analyzing data for financial plans.
- Understanding, following and designing effective and efficient processes and protocols.

WHY JOIN US

Professional development

- If you are building a career in financial planning, working with a smaller firm offers unique advantages. At Vantage you'll get a birds-eye view of the entire process, working with the investment team, operations and multiple wealth managers. While it may take some time, we can help you move up faster than you typically would at a large corporation.

A heart to serve

- Our mission at Vantage is to help individuals feel a greater sense of control over their financial future, You'll play an important role in achieving the mission and, in the process, make a difference in people's lives.

Great environment

- You will gain experience in a collaborative, engaging, friendly environment surrounded by peers who enjoy pooling their knowledge and experience to yield out clients unmatched excellence.

Excellent Compensation

- We offer a competitive salary along with benefits that include a choice of health, dental and vision plans.
- 401(k) plan with company match.
- Paid time off and paid holidays.
- Reimbursement for continuing education and certification. We also will consider supporting educational opportunities in some circumstances.

ROAD TO SUCCESS

We are looking for an individual who is motivated to obtain a CFP and build a career. We'll provide mentoring and opportunities. although you should understand that advancement may take time. We believe we offer a faster path than big corporations, but you should be prepared to work three to five years in order to earn the next step.

To excel in this role you will have the right balance of analytical savvy and interpersonal skills. You may work with dozens and sometimes hundreds of pages of data, and you'll need to transform that into valuable insights that are easy for clients to understand. As you interact with clients directly, you will need to engage in a warm and authentic way, demonstrating a genuine interest in their success.

CONTACT US

If you are interested in the Financial Planning Analyst role please email your Cover Letter and Resume to Kim Taylor (ktaylor@vantagefinancial.com) or James Lawson (jlawson@vantagefinancial.com) for consideration.