



## Financial Planning Assistant

Minneapolis, MN

Focus Financial is an independent registered investment advisory firm headquartered in Minneapolis with more than 100 advisor practices in 55 branch offices across 6 states. With over \$5 billion in assets under management, we're consistently recognized as a top wealth management and investment advisory firm.

Our **Minneapolis** office, centrally located off 35W and Industrial Boulevard, is seeking a full-time Financial Planning Assistant. This person will be an integral part of the team with an emphasis on client service, managing details, organization, and follow-up as well as support of senior financial advisor and client service manager.

### Qualifications:

- 2 years+ experience in a financial planning setting is required
- Series 7 preferred or a willingness to obtain within first year
- College degree preferred
- Ability to deal with sensitive data and maintain the strictest confidentiality with the Financial Advisor, clients and office personnel
- Excellent organizational and communications skills. Must be very detail oriented, with the ability to multi-task and the flexibility to manage changing priorities
- Excellent client service skills; the highest level of professionalism is required
- High proficiency with computers - MS Office required (Word, Outlook, Excel). Redtail (online CRM), MoneyGuide Pro (planning software) and Morningstar (research) experience is preferred or ability to learn is required

### Responsibilities:

- Scheduling – manage advisor's calendar and schedule all client meetings
- Phone Communication – answer incoming calls, make outgoing calls as needed
- Account Servicing – complete account paperwork/applications (create, scan, process, index, follow-up)
- File Management – maintain accurate and complete files, both electronic and paper
- Compliance – assist in maintaining and following compliance requirements
- Database Management – maintain client data in Redtail (web-based CRM)
- Correspondence – manage incoming and outgoing communications
- Project Management – complete assigned projects independently
- Back-up support to the Client Service Manager
- Support marketing initiatives
- Process Improvement – continually seek ways to improve client service experience and increase office efficiencies

**Salary & Benefits:** Competitive salary based on experience and qualifications, 401(k) with match, health and dental insurance options, disability insurance, and PTO.

We are looking for a professional with an attitude of service, extreme attention to detail and a desire to learn about financial matters. Interested? Send your resume to: [mhconsulting9@gmail.com](mailto:mhconsulting9@gmail.com). No phone calls please.