Associate Financial Planner

Seattle, Washington

OUR COMPANY

We are a financial planning firm that's different than most other advisory firms. Our vision is to provide equitable access to objective financial planning, giving people the tools and understanding to find happiness in their own version of success. Because we don't require clients to have a minimum amount of assets to work with us, we work with a diverse population of clients. We provide comprehensive financial planning to our clients using processes we've developed over multiple years.

THE JOB

The Associate Financial Planner position starts your career at Arrivity Financial Planning and is best suited for applicants with 0-3 years of experience in the financial planning industry. Depending on your level of industry experience, we would expect an Associate Financial Planner to move up to a Lead Financial Planner role within 1-3 years.

During your time as an Associate Financial Planner, you will receive training on all aspects of the client experience, from administrative and operational tasks to preparing each section of a financial plan. You will be assigned to work with a team of planners, and you will assist them in preparing financial plans for clients, as well as managing day-to-day client communications and inquiries.

The training you receive while in this position will prepare you to confidently step into the role of a Lead Financial Planner in the future.

IN THE FIRST MONTH YOU WILL:

- Meet with all team members: learn about their role, responsibilities, and understand how your role and their role in the firm work fits into the broader Arrivity ecosystem.
- Sit in on client meetings and be the notetaker to document the client's financial goals, financial situation, and scope of the financial planning project.
- Learn the data gathering process and the different types of assets, liabilities and spending data needed for comprehensive financial planning.
- Begin to use our tools for building financial plans including Current Financial Asset and Household Cash Flow.
- Familiarize yourself with software tools including Redtail, Harvest and, Sharefile.

WITHIN 3 MONTHS, YOU WILL:

- Participate with other Associates in managing inbound correspondence from prospects and clients who have questions about our services. Work with these people on the next steps of our onboarding process.
- Learn the basics about asset allocation and how it applies to specific client holdings.

WITHIN 6 MONTHS, YOU WILL:

- Periodically sit in on client plan presentations to better understand the big picture of comprehensive financial planning.
- Begin using our retirement planning software to prepare retirement models.
- Participate in monthly Financial Planner meetings which provide you with an opportunity to learn about a wide variety of topics relevant to the profession.

WITHIN 12 MONTHS, YOU WILL:

- Pass or have passed the Series 65 – Uniform Investment Adviser Exam (or be exempt from taking the exam) to become an Investment Advisory Representative (IAR).
- After passing Series 65, begin working on financial planning skill blocks, which are an internal training system developed by Arrivity Financial Planning to become a financial planner at our firm. The capstone of this program is developing a financial plan and presenting to a client with supervision from a Certified Financial Planning ™ PROFESSIONAL.

IN THE FUTURE, YOU CAN:

- Be a financial planner and have your own client panel using the skills developed as an Associate.
- If interested and approved by other shareholders, become a shareholder in the firm.

BENEFITS

- $60,000 - $65,000 base depending on experience.
- Company-subsidized group health insurance.
- SIMPLE IRA with employer contributions.
- Paid time off (PTO) that begins accruing from your first month, plus PTO for 6 public holidays and the week between Christmas and New Year's.

LOCATION

- This job is based in Seattle, Washington.
- After you receive training and can work independently, we provide a hybrid work environment.

At Arrivity Financial Planning, we value all employees and job candidates as unique individuals, and we welcome the variety of experiences they bring to our company. As such, we have a strict non-discrimination policy. We believe everyone should be treated equally regardless of race, sex, gender identification, sexual orientation, national origin, native language, religion, age, disability, marital status, citizenship, genetic information, pregnancy, or any other characteristic protected by law.