Flourish
WEALTH MANAGEMENT

About Flourish

Flourish Wealth Management is a dynamic and growing independent, fee-only boutique wealth management firm based in Edina, Minnesota. We offer comprehensive wealth management services that seamlessly integrate life planning with financial planning, with a focus on impact and sustainable investing. As fiduciaries, our team is dedicated to prioritizing our clients' best interests, guiding our decision-making process, and fostering a culture of long-term, caring, and trusted relationships.

At Flourish, we are committed to continuous learning, personal development, and team building. We engage an external professional to help us understand our individual strengths, enhance our communication skills, and leverage those individual strength to enhance our team-oriented culture.

Job Description

We are seeking an Associate Financial Planner to join our team. This is a growth-oriented role designed for someone who wants to build a long-term career in comprehensive financial planning and eventually grow into a Wealth Manager role.

The Associate Financial Planner will work closely with Wealth Managers and other team members to prepare financial planning analyses, support client meeting preparation and follow-up, contribute to ongoing planning work, and help improve the systems and processes that support the client experience.

This role is ideal for someone who is technically curious, highly organized, client-focused, and energized by the opportunity to learn. The right candidate will be interested in growing into a future client-facing advisory role while developing expertise across retirement planning, tax planning, estate planning, insurance, charitable giving, cash flow planning, investment coordination, and values-based financial decision-making.

Find out more about Flourish and learn more about our Core Values: Bring Passion and Excellence in Everything We Do, Make a Difference, Grow and Share Our Experience and Insights, Take Initiative and Be Resourceful, and Appreciate & Celebrate at flourishwealthmanagement.com

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This position is hybrid, with two days a week at Edina, MN office

Salary and Benefits

- Base Salary $80,000 - $90,000 based on experience
- Incentive bonus compensation based on salary and conditioned on firm revenue and individual goals
- 401(k) plan with employer contribution
- Medical plan, Dental Plan, and Health Savings Account employer contribution
- Employer paid long term disability coverage
- Unlimited PTO plus company-wide bonus holiday week
- 10 paid company holidays
- Firmwide communications training and career development
- Personalized development plans in coordination with outside resources
- Paid time off for volunteer opportunities
- Time to Appreciate and Celebrate!

Duties and Responsibilities include:

- Support Wealth Managers in preparing comprehensive financial planning analysis for clients including retirement projections, cash flow planning, tax planning, charitable giving, insurance, estate planning, beneficiary review, education planning, and Social Security/Medicare considerations.
- Help prepare client meeting agendas, planning summaries, follow-up notes, and action items.
- Research planning questions and summarize findings in a clear, practical, and client-ready manner.
- Help identify planning opportunities, risks, and follow-up items for review with the Wealth Manager.
- Participate in client meetings alongside Wealth Managers while developing the skills to eventually lead portions of client meetings.

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Duties and Responsibilities Continued:

- Coordinate with the Investment Team on planning-related portfolio needs, including cash needs, asset allocation considerations, charitable giving strategies, and client-specific preferences.
- Collaborate with outside professionals, including CPAs, attorneys, and insurance professionals.
- Participate in networking, professional association, community, and social media activities to build relationships, represent the Flourish brand, and support client service and firm growth. Help Flourish continue to streamline workflows ,improve how we use technology, responsible AI adoption, and business systems to support the client experience.

Position Requirements:

The ideal candidate is a strategic problem-solver and relationship-builder who thrives in a client-centric, high-touch environment and takes ownership of their work.

- Approximately 2 years of experience in financial planning, wealth management or a related financial services role.
- CFP® designation or in progress of obtaining the CFP®.
- Excellent written and verbal communication skills demonstrating professionalism and ability to connect on a personal level.
- Strong attention to detail and ability to organize information clearly.
- Growth-mindset, curiosity, empathy, and a desire to understand the personal side of financial decision-making.
- Strong analytical and problem-solving skills.
- Self-starter with a commitment to learning, improving systems, and taking initiative.
- Team-oriented mindset and willingness to support others.

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Position Requirements Continued:

- Comfort with technology and interest in using AI and planning tools to improve quality, efficiency, and client outcomes.
- Experience with Schwab, Salesforce, MoneyGuidePro, Holistiplan, Orion, ShareFile is a plus but not required.

The Process:

Qualified candidates will start the process by having a 15- to 30-minute zoom interview conducted by our consultant (the hiring manager for this position). If there is ground to move forward, you will be required to fill out a Career History Form and if you are selected to advance in the process, you will meet with the firm. Qualified candidates may be asked to take assessments.

We are a woman-owned business and are committed to promoting diversity and inclusion in our hiring process, and we are proud to be an equal opportunity employer.