Financial Planner

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 special 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 identify opportunities to strengthen our team-oriented culture.

Do you have a passion for helping others? Are you naturally curious, comfortable working in a team-based environment, and committed to exceeding client expectations? Would you be excited to join an entrepreneurial environment that embraces new solutions and new technology?

We are looking for a **Financial Planner** who embraces our values and is committed to helping our clients identify and achieve their personal and financial goals. The Financial Planner will work closely with the Relationship Manager to prepare and deliver holistic and comprehensive financial planning to our clients, while working with the rest of the team to develop and refine processes that support the client experience.

Find out more about the company 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 www.flourishwm.com.

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SALARY AND BENEFITS

- Base salary $100K-120K, plus incentive compensation plan with a firm and individual component to payout (averaging ~15% of base salary)
- This position has immediate room for mentoring and growth, and there will be a possibility for firm equity for the right person down the road
- 401(k) plan with employer contribution
- Medical plan and Health Savings Account contribution
- Employer paid long-term disability coverage
- Unlimited PTO plus bonus holiday week
- 10 paid company holidays
- Firmwide communications training and career development
- Bi-weekly education meetings focused on learning and Diversity Equity and Inclusion (DEI) initiatives
- Personalized development plans in coordination with outside resources
- Paid professional dues, continuing education, conferences, and training
- Fully remote position (Hybrid for candidates that are in the Twin Cities area)
- Paid time off for volunteer opportunities
- Time to Appreciate and Celebrate!

RESPONSIBILITIES INCLUDE:

- Create an exceptional client experience by understanding their values, personal money history, key relationships and life transitions.
- Design, present, and implement detailed, proactive financial planning solutions focused on retirement, investments, cash flow planning, multi-year tax planning, asset protection and estate planning.
- Prepare financial analysis for clients that consider their specific preferences, values, goals, and priorities with a vision to accomplish the client's personal and financial goals.
- Participate in client meetings with the delivery of financial planning recommendations alongside the Relationship Manager, with the plan to take over some client relationships over time.

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RESPONSIBILITIES CONT:

- Develop the skills to lead comprehensive client meetings that discuss all phases of the wealth planning cycle to identify and educate clients about complex issues, connect to the emotional aspects of money, then offer creative solutions to help clients accomplish their goals.
- Anticipate and take the lead on day-to-day client needs.
- Coordinate with outside professionals to implement financial planning on behalf of clients and ensure the highest level of service.
- Integrate investment solutions with our Investment Team through coordination of asset allocation, cash needs, charitable giving, and impact goals for ESG investments.
- Coordinate with Client Service Team
- Participate in building new client relationships in collaboration with strategic partners in the community.
- Commit to a culture that supports continuing education and team development at all levels with opportunity to write blogs and lead a knowledge area (i.e., tax planning, social security, charitable giving).
- Support a commitment to improving the firm, client, and team experience through strategic planning experience.
- Able to jump in and support others as the success of the entire firm relies on each person working together for shared goals.

QUALIFICATIONS:

- 5 years plus experience in wealth management/financial planning
- CFP® designation required.
- Excellent written and verbal communication skills demonstrating professionalism and ability to connect on a personal level.
- Excellent client service and relationship management skills
- Curiosity, empathy and high emotional intelligence with clients, firm, team members and broader community.
- Attention to detail and team-player attitude
- Ability to lead, mentor and develop others
- Self-starter with a commitment to ongoing learning
- Solicits and provides feedback with growth personality

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QUALIFICATIONS CONT:

- Ability to travel 2-4 times per year to Minneapolis for remote team member
- Experience with our custodian and software is not required, but will be a plus: Schwab, Salesforce, MoneyGuide Pro, Holistiplan, Orion, Sharefile and Money Quotient

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.