Overview	
Job Title:	**Associate Planner**
FLSA Status:	Non-exempt
Reports To (Title):	Senior Advisor
Supervisory Responsibilities:	N/A
General Summary:	The Associate Planner is an entry level position, designed for the basic development of future Planners. They will provide support by learning and completing assigned work. The Associate Planner will be responsible for pre-planning, requesting documents for, and attending and participating in meetings with the Senior Planner/Planner. Associate Planner will also be involved with client phone calls, emails, and custodian/client phone calls at Senior Planner/Planner's discretion. This position reports to the Senior Planner(s). Individual should be highly capable of solving problems and working with our team to best serve the client's needs. This person should also exhibit excellent oral and written communications skills.

Principle Duties and Responsibilities	
Responsibilities	• Work closely with Senior Planner to develop financial planning knowledge • Help prepare for Prospect/Client meetings • Attend and Participate in Prospect/Client meetings • Maintain current and thorough client records

Essential Functions:	• Client Communication in the form of phone calls, emails, and conference calls • Planner support in pre planning to confirm key client information/documentation is up to date • Attend client review meetings with Planner/Sr. Planner • Remain in client meetings to complete applications and forms with client once Planner/Sr. Planner has concluded review • Dictate note to file after client meeting • Provide support to management and offers advice on how to handle situations (e.g. – issues with a client, custodian, or an internal process) • Administer life insurance and annuity evaluation process, if applicable • Create and provide management reports and client presentations • Attend and participate in client meetings • Works within financial planning software to enter baseline facts, as well as runs analysis report from other planning software e.g., Social Security Analysis • Learn, utilize, and refine/administer the systems, processes used for development, onboarding, and service • Additional duties could include operations management, executive administrative support and other duties as assigned

Job Specifications	
Experience Requirements:	• Microsoft Office Suite proficiency in Word, Excel, PowerPoint, and Outlook • SalesForce experience preferred but not required
Education Requirements:	• High School diploma or equivalent required
Required Licenses and/or Designations	• Currently hold Series 65 designation and Georgia Life Insurance License • Willingness to obtain or currently hold *CFP* or *RICP* designation
Preferred Experience, Education & Training:	• BA/BS degree in Business or related field is preferred • Minimum of *two* years of experience in an administrative, operations and/or client service role, preferably in the financial services or securities industry
Ideal Candidate DNA:	• Excellent character and reputation • Detail oriented, motivated, enjoys multi-tasking in a fast-paced environment • Responds well to changing and evolving job duties and expectations • Able to work independently and is also comfortable with close teamwork • Good organization and project management skills • High sense of urgency and strong work ethic • Strong verbal and written communication skills • Ability to discretely handle confidential data

The statements above are not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the job. Duties, responsibilities, and activities may change at any time with or without notice.