

Junior Planner

Toler Financial Group (TFG) is headquartered in Silver Spring, MD, and we serve clients in the Washington DC metro area and across the nation with a primarily fee-based practice. We welcome a diverse clientele, and many are interested in our sustainable and impact investment expertise. We have a “planning first” approach, put our clients first in everything we do, and are careful to guard our strong reputation.

We are seeking a motivated and energetic professional to join our team as a Junior Planner in our Silver Spring office. We strive for a culture that empowers its employees to be an integral part of a unified team, contributing to the value and success of our organization and to the financial success of our clients.

Summary

The Junior Planner position requires strong skills in the area of data gathering, entry, analysis and management, as well as thoughtfully servicing our clients in a wide range of areas. Attention to detail, customer service orientation, capacity to manage and prioritize many complex tasks, collaborative style, friendly personality and good work habits are essential.

Responsibilities

- Full team member with shared responsibility for smooth and profitable operations
- Financial planning case preparation, analysis, follow up, and other support
- Investment analysis and participation on our investment committee as a research analyst
- Investment servicing such as client requests, deposits and withdrawals, and applications
- Trading and model rebalancing.
- Develop and maintain workflows and systems for the team
- Pursue and maintain all licensing and continuing education requirements
- Active participation in firm marketing, including events

Knowledge, Skills & Abilities

- A burning desire to succeed with complete integrity
- A genuine interest in serving and caring for other people
- Strong interpersonal and communication skills
- Positive attitude and ability to take care of our clients
- Great organizational and time management skills
- Strong analytical skills and detail orientation
- Previous financial planning and/or wealth management experience ideal
- Ability to handle multiple tasks and demands with humor and confidence
- Bachelor’s Degree or higher
- Insurance license (within 3 months)
- FINRA Series 7 and 66 license (within 6 months of hire)
- CFP or CFA designation (within 3 years, ideally has begun the CFP coursework)
- Proficiency with MS Office, especially Excel
- Written and verbal English fluency, other language proficiency welcome

Benefits

In exchange for your time, energy, commitment and expertise, we offer a base salary (commensurate with education, experience, and licensure), profit-sharing bonus, 401k with matching, health insurance, education/conference benefits, and a great working environment in a professional office location near the Silver Spring metro. This is an opportunity to play a key role in a small, rapidly growing company where your potential to excel is unlimited.

Because we are a small team, there are many opportunities for diverse assignments and advancement in several different directions. Our interest is in helping you find the right long-term fit in our firm as it grows, and to maximize your potential. For the applicant who pursues a Financial Advisor position later, firm partnership may be an option.

TFG is an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, sexual orientation, national origin, disability status, protected veteran status, or any other characteristic protected by law. We are a very LGBT-friendly office, and our whole team must be very comfortable working with our diverse clientele.

Send resume and cover letter to INFO@TolerFG.com