GREENSPRING

Position Description: Financial Associate

Job Title	Financial Associate
Dept/Division	Private Client Group
Date	Summer 2017

Purpose	The Financial Associate will work in conjunction with their assigned Lead Advisors to determine the financial needs of clients and to provide advice and make recommendations on products and services that best meet their needs. Duties include assessing clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives to establish investment strategies. The candidate will be servicing the clients of Lead Advisors at the firm.

Responsibilities

1. Ensures the highest standards for serving both clients and lead advisors.
2. Creates financial planning models by analyzing a client's cash flow, net worth, tax returns, investment statements and estate planning documents.
3. Implements Greenspring's client service model for all of the lead advisor's clients they work with (scheduling meetings, generating reports, follow-up with client and outside advisors, and implementation of tasks).
4. Attends client and prospect meetings with lead advisor.
5. Lives out and displays Greenspring's Core Values and Vision

Specific Measures of Success

1. **Licensing**: obtains CFP, CFA or EA designation during tenure as a Financial Associate
2. Ensures that greater than 95% of clients have had **firm contact** within last 90 days
3. Client **Net Promoter Score** (NPS) is 75 or higher
4. All clients are asked to **schedule** an Annual Review Meeting with their lead advisor
5. Greater than 95% of client **portfolios are "in-balance"** using our in-house rebalancing program
6. Average **Associate Review Score** from their lead advisor(s) is greater than 4 out of 5 (Lead Advisor survey of Associate's skill in attention to detail, creative problem solving, meeting deadlines, self-starter, and technical abilities)

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Job Requirements

Industry/Business Experience	Minimum 1-2 years experience working in financial service industry
Education	Bachelor's degree required Certified Financial Planner or currently working towards this designation
Licenses	FINRA Series 65 desired
Skills & Knowledge	Focus on client needs and customer service Detail oriented Strong organizational skills with a proven ability to multi-task and manage multiple projects A team player with good interpersonal skills and the ability to work collaboratively across departments Excellent oral and written communication and presentation skills Demonstrated analytical skills, problem-solving abilities, and attention to detail Ability to excel in a fast-paced, changing environment Excellent interpersonal skills and ability to be highly relational with clients and staff A self-starter who is assertive, independent, and a global thinker

Company Profile

Greenspring Wealth Management is a fee-only wealth management and retirement plan consulting firm located in Towson, Maryland. Our Private Client Group primarily works with individuals and families with a net worth of $2 million and above who engage us to provide Financial Planning and comprehensive Wealth Management Services. Our Institutional Services Group provides Independent Fiduciary Services to retirement plan trustees who generally oversee plan assets between $5 million and $100 million.

Greenspring is consistently ranked as one of the country's leading independent advisory firms. We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. We offer a competitive compensation package including:

- Health and Dental Insurance
- Disability Insurance
- 401(k) Plan with Safe Harbor Match and discretionary profit sharing contributions
- Health Savings accounts
- Paid Leave & Vacation Allowance

Please submit your resume to patrick.collins@greenspringwealth.com