

Position Description: Financial Planner

Location	Towson, Maryland – on-site
Purpose	<p>At Greenspring, our Core Purpose is to “help every person live their ideal life” and we are looking for talented people who share this passion. Working at Greenspring gives you the ability to:</p> <ul style="list-style-type: none"> • Own your future with defined career paths and tools, coaching, and support to help you create the future you want • Thrive in a great culture where you’ll be a part of a team of people who are committed to each other’s success • Make a lasting impact on the lives of our clients through the camaraderie of working for a common goal with your peers <p>The Financial Planner role will support both firm Practice Groups:</p> <ol style="list-style-type: none"> 1. For the Private Client Team, the Financial Planner will prepare complex and comprehensive financial plans for our private wealth clients. The individual will be responsible for gathering client data, researching creative financial planning solutions, inputting data into financial planning software tools, and making basic recommendations on client financial plans. 2. For the Retirement Plan Consulting Team, the Financial Planner will be guiding 401(k) plan participants through investment decisions and recommendations, helping them determine the best action regarding their retirement assets, and assisting them with plan-related inquiries. This individual may conduct on-site and over-the-phone education meetings with plan participants using the Greenspring investment methodology and materials. <p>This role is critical to setting and maintaining high service standards for the firm, creating positive client experiences, and fostering a culture of teamwork and collaboration.</p>
Responsibilities	<ul style="list-style-type: none"> • Collect, organize, and review data gather from clients for estate, retirement, tax, education, and insurance planning • Prioritize, batch and enter a high volume of data into financial planning software tools with precision and accuracy • Produce and create financial planning reports for Lead and Senior Advisors to present to clients • Provide education on investment vehicles such as 401(k)s, Traditional and Roth IRAs, as well as investment planning/saving principles. Tailors the conversation to the needs and demographics of the audience • Participate in the firm’s Financial Planning Committee

Specific Measures of Success	<ul style="list-style-type: none"> • Quickly responds to requests and resolves open tasks • Proactively eliminates obstacles before they become issues • Demonstrates efficiency in working with multiple advisors across multiple sites by leveraging firm resources and tools • High degree of pride in the accuracy and quality of your work product
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Job Requirements

Industry/Business Experience	Entry-level or up to 5 years in financial services and/or financial planning
Education	<ul style="list-style-type: none"> • College degree or comparable experience. On track to complete the CERTIFIED FINANCIAL PLANNER™ certification is a major plus. • Financial Planner will be required to obtain their Series 65 license within the first 90 days of employment. Within 2 years, the individual should work towards obtaining the CERTIFIED FINANCIAL PLANNER™ certification
Skills and Knowledge	<ul style="list-style-type: none"> • Always focused on client needs and customer service • Excellent oral and written communication skills • Detail-oriented and methodical • Follows up and follows through • Exceptional 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 • Demonstrated problem-solving abilities • Ability to excel in a fast-paced, changing environment • A self-starter who is assertive, proactive, independent, flexible, and accommodating • Expert in most Microsoft Office applications. Comfortable learning and navigating new technology and software applications. Experience with Salesforce and MoneyGuidePro is a significant plus.
Requirements/Additional Information	<ul style="list-style-type: none"> • Start base salary range: \$55,000-\$65,000, with opportunity to earn an additional discretionary annual bonus up to 10% of earnings, as well as potential bonus for business development activities. • This individual will report to the Director of Financial Planning • The first 90 days will include an extensive, in-person onboarding/training program. • After the first 90 days and with manager’s approval, the Candidate may be eligible to work from home for a specified number of days per month. • This role may involve some occasional travel • Ability to work two evenings per week • Bilingual (Spanish) is a major plus
How to apply	Send your resume to careers@greenspringadvisors.com

Firm Profile

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, Dental, and Vision Insurance Offered
- Health Savings Accounts
- 401(k) Plan with employer match and discretionary profit-sharing contributions
- Paid Leave & Vacation Allowance
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Free financial planning and investment management services
- Eligibility for GREEN Units (equity compensation) after 2 years with the firm
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Cellphone Usage Reimbursement
- Matching Gifts Program
- Stand-up desks, dual computer monitors, monthly social events, and volunteer hours
- Paid parking in our adjoining garage

Greenspring is an Equal Opportunity Employer. It is the policy of the Company to provide equal opportunity for all employees and applicants for employment without regard to race, color, creed, religion, gender, sexual orientation, national origin, age, marital status, mental or physical disability, pregnancy, military or veteran status, or any other basis prohibited by state or federal law. This policy also prohibits employees from harassing any other employees for any reason including, but not limited to, race, religion, sex, national origin, age, or disabled status.