



GREENSPRING ADVISORS

Corporate Retirement | Wealth Management

Position Description: Financial Planner

Location	Towson, Maryland – ON SITE
Purpose	<p>At Greenspring, our Core Purpose is to “improve lives by helping people make better decisions for themselves and those who depend on them” 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• Be Part of 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 and 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 be preparing 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; Serve as a subject-matter expert for advisors on complex financial planning topics.2. For the Retirement Plan Consulting Team, the Financial Planner will be guiding retirement plan participants through investment decisions and recommendations, helping them to determine the best action regarding their retirement assets, as well as providing financial planning assistance to participants and company executives. 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 for 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

	<ul style="list-style-type: none"> • Produce and create financial planning reports for Lead and Senior Advisors to present to clients; provides detailed analysis to advisors in addition to reports. • Provide education and financial planning advice to retirement plan participants. Tailors the conversation to the needs and demographics of the audience • Provide advanced-level planning knowledge and expertise to external and internal stakeholders • 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

Job Requirements

Industry/Business Experience	2+ years in financial services and/or financial planning
Education	<ul style="list-style-type: none"> • College degree or comparable experience. • CERTIFIED FINANCIAL PLANNER™ Professional preferred; Series 65 license required
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 a major plus.
Requirements/Additional Information	<ul style="list-style-type: none"> • Start base salary range: \$65,000-\$75,000, with opportunity to earn a discretionary annual bonus up to 10% of earnings, as well as additional 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
- GREEN Units (equity ownership in the firm after two years)
- Paid Time Off + Volunteer PTO
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Free financial planning and investment advice
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Cellphone reimbursements
- 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.