LODESTAR
PRIVATE ASSET MANAGEMENT

Associate Financial Planner

Lodestar Private Asset Management

We are an independent, fee-only Wealth Management firm in Alamo, CA (San Francisco Bay Area), seeking an Associate Financial Planner to join our rapidly growing firm. Candidates with 0-3 years' experience in the financial planning profession, or CFP-program students graduating in 2021 are highly encouraged to apply.

Our firm provides comprehensive, holistic, financial planning and investment management services for individuals, families, and business owners. We believe that every individual can benefit from some level of financial advice, planning or management help. While most of our clients need ongoing financial planning and investment management services, other clients we work with can greatly benefit from a limited, focused engagement based on their situation. For that reason, we work with clients under one of two arrangements:

- Ongoing Financial Management (AUM model) – ongoing asset management, comprehensive financial planning, and advice year-around on any financial-related topics.
- Hourly Advice & Comprehensive Financial Plans (Hourly Fee model) – financial consultations and customized financial plans that clients implement themselves.

Position Overview

This is a professional position that will assist in the creation of complex and comprehensive financial recommendations. You will be involved in the entire client engagement and will be encouraged to grow into a Senior Financial Planner. To be successful, you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions.

Key Traits of the Ideal Candidate

- Connects with Others – others should feel comfortable opening up to you and sharing personal details and feelings around their situation.
- Analyzes Facts and Feelings – analyzing facts and figures is important, but you also should be skilled in reading non-verbal cues to relate most effectively with clients.
- Delivers Logic with Compassion – logical financial advice is more effective when it is delivered in a warm and caring environment that you should help create.
- Improves the Team – when processes or situations can be improved, you should take calculated action, aiming to put everyone around you in a better position.
- Learns and Shares Knowledge – you should be naturally curious and driven to learn, and you should enjoy sharing your knowledge with others in ways that help them improve their lives.
- Craves Feedback – direct feedback from trusted peers helps us advance quickly and gracefully. You should view each meeting or situation as an opportunity to learn.

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Initial Responsibilities

- Participate in client meetings
- Collect, organize, and synthesize personal and financial client information
- Analyze clients' financial planning needs
- Act as a concierge for clients to help them execute important tasks
- Create deliverables for meetings and other engagements
- Continuously monitor clients' financial situations with detail and accuracy
- Be available to field ad hoc planning questions from clients
- Conduct research projects for the company and its clients
- Participate in company meetings and help influence company-wide decisions
- Improve firm operations by creating and completing internal projects

Key Qualifications

- Strong logical mind (e.g., enjoy puzzles and skilled at deductive and inductive reasoning)
- Organized, with a strong attention to detail
- Demonstrated academic achievement (e.g., high GPA, high Standardized Test scores)
- Strong interpersonal skills
- Demonstrated passion for helping others
- Demonstrated personal financial management responsibility (i.e., responsible with own finances)
- Meaningful experience with the following is not required, but a plus:
    - Mentoring and teaching
    - MoneyGuidePro, Morningstar Office, or any other financial planning-related software
    - Written communication and publications
    - Pivot tables and other advanced functions in Excel

Benefits

- Competitive salary with bonus incentive structure
- 401(k) with employer matching contributions
- Health, dental, and vision insurance
- Continuing Education – paid professional dues, conference attendance, training budget, etc.
- Mentorship in a collaborative team environment
- Significant career growth opportunity with ability to customize role within the organization

To apply, please email Bryan Hasling (bryan@lodestarpam.com) and include:

- Your resume and cover letter, as well any attachments or links that may help us learn more about you (e.g. LinkedIn, publications, blogs, etc.)