FINANCIAL PLANNING PROFESSIONAL OPPORTUNITY – LIFE PLANNING PARTNERS, JACKSONVILLE, FLORIDA

Join a true ensemble of experienced financial professionals working together to provide holistic financial planning for client families. We are looking for:

- A CERTIFIED FINANCIAL PLANNER™ professional who is passionate about helping people make the best decisions for their financial lives.
- A professional who enjoys providing holistic financial planning to clients, and wants to get more deeply involved in personalized advice and implementation.
- A lifelong learner who is interested in learning more about tax planning, estate planning, and communications within a planning team.

This is a salaried opportunity and is not a sales role.

Our new planner will:

- Maintain relationships with clients within the team environment.
- Learn our comprehensive planning process, with the goal of becoming the expert in our firm on tax and estate planning.
- Work with the team to create, design, develop, implement, and monitor client financial plans.
- Commit to their own professional development and contribute to the improvement of the firm.

For our clients, we believe:

- Financial life planning is an ongoing process, revolving around holistic, objective, individualized financial advice in areas of goals, cash flow, tax, estate, insurance, and investments.
- Disciplined investment management is part of the planning process and is based on long term tactical asset allocation.
- Plan implementation is our responsibility, partnering with the client to make sure agreed upon actions are completed.

For our team, we believe:

- Open and direct communication is needed to share information and work together well.
- All questions are good questions and mistakes are opportunities to improve.
- Reliability and integrity are important for us and our clients.
- Work-life balance is important for each of us and we should create great lives for ourselves as well as clients.
- Work should be rewarding and fun, and the people we work with and for should bring joy and respect to our lives.

YOU SHOULD HAVE

- CFP® designation with three years of experience providing financial plans and advice directly to clients is preferred. We will consider those who have completed the CFP® curriculum but have not yet taken the exam or fulfilled the experience requirement.
- Broad personal financial knowledge and expertise.
- Analytical thinking, openness to learning new things, and quality focus.
- Strong computer skills, especially with MS Excel, Word, and Outlook. Experience with eMoney, Salesforce, and/or Black Diamond is a plus.
- Ability to manage multiple tasks and work within collaborative environment.
- Intellectual curiosity, the ability to deal with ambiguity, and an entrepreneurial spirit.
- A passion for excellence, respect for others, and expect a lifetime of learning.
- Customer service, communication (both written and verbal), and presentation skills.
- Excellent time management, good self-structure, and strong initiative.

About Life Planning Partners

Life Planning Partners is a boutique financial planning firm, registered with the SEC and a member of NAPFA. As an ensemble firm with two CERTIFIED FINANCIAL PLANNER™ professionals currently and a Chartered Financial Analyst, we are able to provide "deep dive" financial planning and to handle much of the plan implementation for our clients. Founded by Carolyn McClanahan, M.D., a former emergency room physician, LPP is on the forefront of the industry in health and long term care planning and focuses on planning for today, not just planning for an uncertain tomorrow.