Putting client needs first is deeply rooted in the Bulman Wealth Group culture and at the core of everything we do. If you're a looking to build a career in finance, we have an opportunity for you! This is an opportunity for someone who is dedicated to serving clients, has a desire to be a part of a growing team, and wants to contribute to an amazing firm culture. If this sounds like you, let's talk.

**1. POSITION TITLE: Financial Planning Manager**

**2. GENERAL SUMMARY OF DUTIES AND RESPONSIBILITIES**

The Financial Planning Manager will deliver exceptional service by performing various industry specific tasks in support of our Financial Advisors. This position will interact heavily with clients in person, on the phone, and through written communication; maintaining a strong, client first relationship is expected. Strong attention to detail is required when partnering daily with firm advisors to ensure thorough preparation for all prospective and current client meetings. Position may require employee to deliver 1:1, small group, and large group trainings and presentations to peers and clients.

**3. PRIMARY JOB DUTIES**

1. Develop, manage, and retain strong client relationships
2. Develop, manage, and retain professional industry related vendor relationships
3. Proactively work with advisors, clients, and carriers to resolve issues
4. Assist advisors with meeting individual and firm goals
5. Build and maintain client files according to Bulman Wealth Group expectations
6. Complete, process, and deliver client paperwork, as needed
7. Record notes from every client conversation in Customer Relationship Management (CRM) database, alert COO or advisor should issues arise
8. Manage all pre-appointment preparation including securing current account documentation and reports
9. Submit documentation and generate various reports for portfolio analysis using identified platforms
10. Gather updated account values and complete client review summary for upcoming review appointments
11. Operate with a proactive approach to advisor & client related tasks
12. Lead the operations team in the implementation of eMoney; support and train as needed
13. Onboard, train, communicate, and update clients on eMoney solutions available to them
14. Respond to inquiries within 24 hours of receipt
15. Perform detail oriented tasks with specialized attention to sensitive and/or confidential content

**4. SKILLS, KNOWLEDGE, AND ABILITIES**

- Ability to prioritize projects and manage time
- Attention to detail and accuracy
- Consistent follow-through
- Process driven
- Excellent communication skills, both written and oral
- Uses discretion, exercises good judgement, and maintains confidentiality of sensitive information
- Demonstrates persistence to achieve high quality
- Strong appreciation for the importance of completing tasks on deadline
- Strong phone and presentation skills
- Command of the English language and grammar
- Experience working in a fast-paced environment
- Advanced knowledge of computers and G-suite
- Ability to multi-task

**5. PERSONAL SKILLS**

- Desire to build relationships with people; pleasant disposition
- Highly organized
- Self-starter
- Flexible
- Service oriented
- Desire to support a team
- Strong work ethic

**6. MINIMUM REQUIREMENTS**

- Previous experience processing confidential documents
- Previous client interaction in an office environment
- Previous experience working in a financial services related role, preferred
- Insurance licensing, preferred
- BA/BS degree, preferred
- Series 65 or equivalent licensing or ability/interest in obtaining, preferred