

## Employment Opportunity



**Job Title:** FINANCIAL PLANNING ASSOCIATE

Mindful Asset Planning ([www.mindfulplanning.com](http://www.mindfulplanning.com)), located in Apple Valley, MN (since 1988), is a fee-only financial planning firm composed of a compassionate team of advisors, financial planners, investment specialists and client service experts. Our unique comprehensive planning integrates both financial and human asset strategies to achieve the best outcomes for our clients.

**Primary Function:** Prepare/assist with plan preparation and presentation to clients; financial projections and analysis, goal summaries/progress/completion of tasks, communication and advising clients. Other potential functions are Firm marketing, new business development, or Firm finance.

**Knowledge/Skills/Abilities:** Proficiency with software tools such as CRM, financial plans, portfolio analysis, Word, Excel and Outlook, accounting and tax tools. Demonstrate written and verbal skills and effective communication to clients and staff. Focused and dedicated task management and goal achievement. Understand the principles and methodology of comprehensive financial planning and awareness of the psychology and emotions around financial habits and decision-making.

**Requirements:** High integrity and passion to make a difference in clients' lives, strong work ethic and dedication to high quality outcomes, detail oriented and self-motivated, embrace challenging and dynamic work environment, interact professionally and positively in a team environment, excellent written and verbal communication skills. College degree suitable to meet the education requirements to qualify to be a CFP® Licensee

**Compensation:** Relative to experience and education. Competitive salary plus bonus potential. Retirement plan.

**Other:** Interest in assuming greater responsibility over time and eventual company management with potential ownership.

***Please express your interest and background to Becky Sebastian by email or phone***

Becky Sebastian  
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[becky@mindfulplanning.com](mailto:becky@mindfulplanning.com)