

## Employment Opportunity



### **Job Title:** FINANCIAL PLANNING RESIDENT

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.

**Explanation of Residency Program:** A Financial Planning Resident position will be a life-changing experience for the right candidate. Candidates will learn how to be a financial planner within an experienced and well-developed team. Candidates will experience all areas of the CFP® planning process beginning with initial exploratory conversations and following through with financial evaluation, implementation and ongoing support of clients. Job duties are designed to build a foundation for a successful financial planning career and provide the experience necessary to qualify to be a CFP® Licensee. The candidate will be supported and expected to attend professional association events as well as prepare for and take the CFP® Exam. The Candidate will be treated and have the same expectations as other Mindful Asset Planning employees.

**Primary Job Duties:** Financial plan preparation and presentation to clients, including; gathering information, financial analysis and projections, goal summaries/progress/completion of tasks, taking notes in meetings and written and verbal communication with clients. Client service and administrative tasks such as phones, paperwork, moving money, account openings/closings/transfers which are foundational to this industry. New business development is not a direct duty, however, this position supports new business development initiatives and is critical for the ongoing growth of the firm.

**Anticipated Outcomes of Residency Program:** Proficiency with software tools such as CRM, financial plans, portfolio analysis, Word, Excel, Outlook and tax tools. Written and verbal skills with proven effective communication with clients and staff. Focused task management and objective/goal achievement. Understanding of the principles and methodology of comprehensive financial planning and awareness of the psychology and emotions around financial habits and decision-making.

The position will end after approximately 36 months. At that time, the Financial Planning Resident is anticipated to be highly qualified to move on to another position. Should Mindful Asset Planning have an open position at that time an established successful Financial Planning Resident will be *encouraged*

to apply. Should Mindful Asset Planning not have an open position at that time the firm will support the Financial Planning Resident's objective of finding a desired position within another organization.

**Requirements:** College degree suitable to meet the education requirements to qualify to be a CFP® Licensee (CFP® coursework need not yet be completed). Preference for a degree from a CFP Board Registered Baccalaureate or Master's Program.

**Cultural Expectations:** 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.

**Compensation:** Competitive salary plus bonus potential. Retirement plan. Financial support for professional associations (such as FPA) and CFP® Exam preparation and registration if demonstrated success fulfilling Primary Function job duties.

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

Becky Sebastian

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