

BLUESKY

WEALTH ADVISORS

Financial Planning Associate

BlueSky Wealth Advisors

We are a well-established wealth advisory firm seeking to grow our team. We offer a great environment, a reputation for excellence, established clients and excellent growth potential to help you reach your personal and career goals. Our employees are as important as our clients, and we work to provide both with a great atmosphere and learning environment. We value our employees and we take pride in recognizing their outstanding talents and efforts. We are committed to the delivery of superior quality of services based on a foundation of honesty, integrity and ethical treatment.

Position Description:

We are seeking a Financial Planning Associate who is able to work remotely on Pacific Time (PT), eager to learn, familiar with the fee-only fiduciary model of delivering financial advice, and has a basic knowledge of financial planning and investment management strategies. This position requires a goal-oriented, self-motivated and professional person. The selected candidate will have the opportunity for significant career advancement based on demonstrated relationship skills, technical abilities, judgment and integrity.

The primary role of the Financial Planning Associate position is learning the role of an advisor by completing technical financial planning and investment management tasks for clients. The Financial Planning Associate will support the client advisory team by attending client meetings, preparing client financial plans, financial scenarios, and presentations, and assisting in the implementation of recommended strategies for clients.

Qualifications:

- Bachelor's Degree from an accredited college or university
- Solid academic track record
- Interest in/currently pursuing CFP designation
- Proficiency with Microsoft Office (Word, Excel, PowerPoint, and Outlook)
- Detail-oriented, accurate, organized, able to set priorities
- Strong written and verbal communication skills
- Self-starter, takes initiative
- Team player, collaborative, able to work with and through others
- Desire/ability to work successfully in a small company environment
- Professional and knowledgeable demeanor

We Offer:

- Competitive base salary
- Incentive based bonus plan
- 401(K) plan
- Open vacation policy
- Personal development and education opportunities
- Paid membership fees for industry associations
- Career track with opportunities for advancement
- A flexible schedule and work environment

We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check.