Poughkeepsie | Saugerties
(845) 486-5039

Financial Planning Assistant

Who We Are

Taconic Advisors, Inc. is a growing, fee only, comprehensive financial planning company located in New York's beautiful Hudson River Valley. We offer a team environment, a reputation for excellence and a continual focus on how to better serve our clients.

This is a mid-level position that will support advisors in all facets of the client relationship. You will assist in preparing for client meetings: gathering client data, entering data into our financial planning and tax projection software, drafting of meeting agendas, and other client service activities. You must be an independent and critical thinker, focused on meeting clients' needs

Key Areas of Responsibility

Financial Planning and Client Service

- ✓ Gather, review and input client data, including tax projection software
- ✓ Communicate with clients regarding appointment scheduling and items needed for meetings
- ✓ Manage setup and maintenance of client portals, including account aggregation
- ✓ Prepare financial planning software data in preparation for client meetings
- ✓ Work with advisors to prepare meeting agendas and meeting notes for follow-up
- ✓ Organize and execute client communications
- ✓ Assist with client service follow-up activities including account paperwork, distributions, and other transactions as needed.

Office Processes

- ✓ Assist in the development client meeting templates
- ✓ Input information into CRM
- ✓ Make recommendations for improving workflows and firm systems

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Qualification Requirements

- ✓ Bachelor's degree
- ✓ 3-5 years experience in personal finance (Investment Advisory, Accounting, Estate Planning or Insurance industries)
- ✓ Demonstrated progress toward obtaining the CFP® designation
- ✓ Excellent written and verbal communication skills
- ✓ Possess a high degree of accuracy and attention to detail
- ✓ Ability to manage and process paperwork efficiently and accurately
- ✓ Warm, friendly personality with the ability to connect with people
- ✓ Willing attitude: "no job is beneath me," not a clock watcher
- ✓ Independent, autonomous with a "get it done" mindset

Benefits

- ✓ Competitive salary and incentive compensation
- ✓ Contributory 401k plan with employer contribution after first year
- ✓ Paid time off
- ✓ A collaborative office culture with an emphasis on work/life balance
- ✓ Mentoring and learning opportunities to enhance your own career track

For consideration, please submit a resume and cover letter to:
Meredith W. Briggs, CFP® at mbriggs@taconicadvisors.com