Position Description

Title: Financial Planner
Department: Wealth Management
Reports To: Director of Wealth Management
Status: Full-Time

Job Summary

The Financial Planner will serve a variety of functions within MCF. The primary job responsibilities include supporting Financial Advisors within the organization in servicing existing clients, offering leadership to clients in a relationship management capacity, and delivering an exceptional day-to-day service experience to MCF's clients.

The role will assist in client communications, as well as work directly with Financial Advisors (who may serve as the primary Lead Advisor) and Client Associates on client servicing needs, financial planning data entry and strategy, and preparing investment or planning recommendations. Specifically, the Financial Planner will prepare and coordinate client review meetings, including assisting with scheduling, updating data within the client financial plan, and coordinating serviceable action items, among other duties.

The candidate should remain available for day-to-day contact and service requests from clients, serving as the primary internal coordinator of activities for the clients where designated by the firm.

Duties and Responsibilities

The Financial Planner can expect to focus their work in the following areas:

+ Provide exceptional client service to all clients, according to MCF’s service model
+ Facilitate the timing, scheduling, and accurate documentation of all client review meetings and service interactions
+ Manage the onboarding process for clients, including coordination and introduction of the MCF Service Team
+ Communicate with client outside advisors (accountants and attorneys)
+ Manage follow-up activities from meeting “to dos”
+ Assist Financial Advisors in constructing comprehensive financial plans
+ Review client portfolios and financial plans on a regular basis

- Support Financial Advisors with client communication;
    - Serve as a primary point of contact for client correspondence and questions
    - Work directly with MCF's custodial partners and our servicing teams, and become knowledgeable and proficient on their processes and forms
    - Prepare and process client requests according to Firm policies
- Produce annual wealth reports for clients
- Prepare recommendations or scenario suggestions for clients in line with their outlined goals/plans
- Assist clients with both tax return needs and estate planning needs
- Meet with clients on a regular basis
- Maintain and update client information internally in MCF's CRM system
- Participate in monthly Wealth Management and Institutional division service meetings to maintain a working knowledge of issues impacting our business

Qualifications

This position requires the following qualifications and skills:

- Bachelor’s degree
- CPA designation
- Certified Financial Planner™ designation, a plus (or equivalent IAR licensing) (or willingness and desire to obtain)
- An engaging and friendly personality
- Excellent verbal and written communication skills
- Strong organizational skills
- Familiarity with investment and accounting terminology
- Proficient in Microsoft Office and other software applications, including eMoney Advisor and Microsoft Dynamics CRM
- Working knowledge of current tax and estate laws and regulations

+ Willingness to learn and improve working knowledge of capital markets
+ Organized, attention to detail
+ Ability to handle multiple tasks simultaneously and prioritize accordingly
+ Self-motivated, ability to work collaboratively with the entire MCF team
+ Personal characteristics: Client-first attitude, team player, ability to think critically and analytically, engaged in learning and expanding personal knowledge

Employee Signature:____

Manager Signature____