Financial Planner / Advisor

Location: Waco, TX
Job Type: Full-Time
Reports To: Lead Advisor
Firm: ClearVista Financial

Purpose of the Role

This role supports Lead Advisors by providing financial planning expertise and managing a dedicated book of business. The Financial Planner / Advisor will help deliver holistic, biblically grounded advice while maintaining strong, service-first relationships with clients. The ideal candidate is someone who enjoys collaborative work, has a passion for planning (beyond investment management), and is eager to grow into a more senior advisory role over time.

Key Responsibilities

Client Relationship & Meeting Support

- Attend all client meetings with the Lead Advisor; gradually take on presentation responsibilities.
- Lead client follow-up: record meeting notes, track action items, and ensure timely execution.
- Conduct review meetings as assigned, nurturing strong, multi-generational client relationships.
- Serve as the primary point of contact for service-related client inquiries.
- Maintain deep understanding of client households, including relationship mapping and milestone tracking.
- Coordinate celebratory touchpoints and milestone recognition.

Financial Planning & Advice Delivery

- Prepare and update customized financial plans tailored to clients' unique needs and values.
- Analyze client data to provide recommendations on retirement planning, tax strategy, charitable giving, estate planning, and insurance.
- Integrate biblical principles into financial planning discussions (e.g., stewardship, generosity).

- Collaborate with the Lead Advisor to draft and maintain Investment Policy Statements (IPS).
- Conduct portfolio reviews and coordinate implementation of investment strategies, including rebalancing and tax-loss harvesting.
- Serve as a subject matter specialist in a planning discipline (e.g., estate planning, tax optimization, insurance strategy).

Technical Operations & Internal Collaboration

- Manage CRM records, financial planning software (e.g., RightCapital), and documentation workflows with precision.
- Coordinate with Executive Assistant and operations staff to ensure proactive and responsive client service.
- Participate in weekly investment and planning team meetings to remain informed on firm strategy and market trends.
- Assist in the onboarding and analysis of prospective client portfolios and plans.

Marketing, Referrals, & Business Development Support

- Collaborate with the firm's Marketing Director by contributing planning insights, client feedback, and ideas that enhance marketing campaigns and educational initiatives.
- Represent the advisory team professionally in marketing materials, communications, and firm branding efforts as needed.
- Cultivate referral opportunities by building trust-based relationships with clients and their extended networks.
- Support business development through thoughtful participation in client onboarding, strategy discussions, and relationship mapping.
- Maintain strong professional relationships with strategic partners and centers of influence.

Ideal Candidate Profile

- **Relationship-Driven:** Values client trust and long-term partnerships over transactions.
- **Planning-Oriented:** Excels at building, interpreting, and delivering comprehensive financial plans.
- **Faith-Based:** Understands and applies biblical wisdom to money management and planning.
- **Team-Focused:** Works collaboratively across roles to ensure clients receive white-glove service.

- **Growth-Minded:** Has the drive and humility to learn, grow, and take on more responsibility over time.

Qualifications

- Bachelor's degree in Financial Planning, Finance, Accounting, Business, or related field.
- 1–4 years of experience in a financial planning, wealth advisory, or investment service role.
- Progress toward (or completion of) CFP® and/or Certified Kingdom Advisor® (CKA®) strongly preferred.
- Active Series 65 license (or ability to obtain within 6 months).
- Strong communication and business writing skills.
- Proficient with planning tools (e.g., eMoney, RightCapital), CRM systems (e.g., Wealthbox, Redtail), and Microsoft Office Suite.
- Familiarity with biblically integrated planning or a willingness to be trained in values-based advising.

Compensation & Benefits

- Competitive base salary with performance-based bonus structure.
- Simple IRA with employer match.
- Health insurance.
- Paid time off and holidays.
- Opportunities for professional development, CFP® and CKA® support, and career advancement.

How to Apply

To apply, please submit your resume and a short cover letter expressing your interest and alignment with the firm's values to info@clearvistafinancial.com