WILLIS JOHNSON & ASSOCIATES
STRATEGIC WEALTH MANAGERS

Financial Planning Analyst

We are currently pursuing a Financial Planning Analyst that can transition into an advisory role to become an Associate Wealth Manager within 24-36 months. The role of the Financial Planning Analyst is to support the Wealth Managers on financial strategies, plans, and projects while receiving technical training and one-on-one mentoring. They are also responsible for maintaining the client relationship as the first point of contact for clients. Under close supervision of a Wealth Manager, the Financial Planning Analyst will have the opportunity to lead select client cases.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments. We also have an in house CPA to provide tax preparation for our clients that need it. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-only financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events. WJA is also proud to be one of the Best Places to Work for Financial Advisors by Investment News.

Essential Responsibilities

- Input data into financial planning software
- Prepare comprehensive financial plans, reviews, reports and client presentations
- Prepare Wealth Managers and staff in advance to client meetings
- Assist with the management of assigned client cases, including preparation of meeting agendas, client correspondence, quarterbacking all tasks to completion
- Attend client meetings, take detailed notes, prepare follow-up emails, debrief and assign appropriate actions to staff
- May perform basic investment research and research client’s company benefits
- Attend weekly Wealth Management meetings and bi-monthly Investment meetings.
- Assist with client service and operations

Qualifications

- Bachelor’s degree in Finance, Business, Accounting or Financial Planning required
- Master’s or Graduate degree preferred (Masters in Finance, JD, MBA)
- One to three years working experience, or internship in similar industry
- Currently pursuing either CFP, CFA, or CPA designation
- Currently possess or pursuing the Series 65 securities licenses

- Strong technical and interpersonal skills
- Confident, poised and professional in appearance
- Ability to take on creative challenges and manage workload on tight deadlines
- Ability to collaborate and contribute to a team environment
- Experience in eMoney, Redtail CRM, and Orion software systems preferred.

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the selection process. To apply, please email both your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by “Financial Planning Analyst” in the subject line.