**JOB DESCRIPTION**

Title: Financial Planning Services Coordinator

Name: TBD

Last Reviewed: December 31st, 2022

Reports to: Stuart Honenberger

**Summary of responsibilities**

*This position masters the financial planning process. They are engaged with the creation and updating of individual plans as well as monitoring the status of planning across the firm. They are strategic in recommending changes and enhancements to the planning process and deliverables. In addition, this position provides technical support to the advisor, including gathering and organizing client data, maintaining financial plan documents, and preparing reports and meeting documents. They should be up to date on the latest strategies and information related to personal financial planning. They do technical analysis of financial plans while creating client friendly presentations of the information. They collaborate with wealth advisors, specialists, and client service associates to ensure all client needs are met in a timely and complete manner. They communicate frequently with clients in meetings, on the phone and through email to provide financial planning and investment advice.*

**Principal Responsibilities**

* Maintain and report on status of financial plans for clients and service tiers
* Collaborate on the financial planning process and deliverables for clients
* Participate in and lead meetings and capture financial planning information with clients/prospects
* Request needed information to maintain and build financial plans
  + Net Worth Statement, Goal Trajectory, Risk Management Plan and Legacy Plan Outline
* Utilize and maintain software selection for planning (Money Guide Pro, Right Capital, E- Money, etc.)
* Conduct research on various topics (planning strategies, contribution limits, etc.)

**Additional Areas of Focus**

* Respond to client questions and concerns
* Enhance tools for processes related to financial planning (client data collection, etc.)
* Represent Cornerstone Wealth in the community
* Pursue continual training and education
* Participate in and/or host client/prospect events