



Associate Financial Planner

Foster & Motley, Inc. is seeking an Associate Financial Planner to join its team. We are an independent, employee-owned, fee-only firm that provides clients with comprehensive financial planning and investment management. We manage \$1.3 Billion in client assets, have 35 dedicated employees and were recently recognized as the winner of the 2017 InvestmentNews Best Practices Award. The culture of the firm promotes collaboration, professional growth, and a commitment to providing exceptional client service. This is a full-time position located in Cincinnati, Ohio.

Job responsibilities include but are not limited to:

1. Support Financial Planners in the development and maintenance of comprehensive financial plans focused on cash flow, tax planning, investment strategy, retirement planning, estate planning, executive compensation planning and risk management.
2. Assist Financial Planners with client communications, implementing a financial plan, researching specific planning issues, and developing specialized analyses for a client's comprehensive plan.
3. Develop and maintain a "client-first" service mentality.
4. Demonstrate a willingness to work as a team, find solutions and develop new skills.
5. This is a position that has room for advancement.

Qualifications for this position:

1. CFP® and/or CPA or working towards either designation.
2. Bachelor's Degree required.
3. 2-5 years of professional experience in a wealth management or financial services field. A strong background in tax is preferred but not required.
4. Detail-oriented with a demand for a high degree of accuracy and ability to follow direction.
5. Highly proficient in Microsoft Office products. Proficiency in eMoney preferred but not required.
6. Excellent written and verbal communication skills.
7. Team player, able to work well with all levels of the firm and with clients.
8. Interest in professional and personal growth by involvement with professional and/or community organizations.

What we offer:

1. Challenging work environment where you can make a difference in the lives of our clients.
2. Competitive salary commensurate with experience.
3. Annual profitability/performance bonus.
4. Safe Harbor 401(k) plan with discretionary profit sharing.
5. Medical, Short-Term/Long-Term Disability and Group Life insurance.
6. Paid vacation.
7. Opportunities for professional growth and continuing education.

If interested, please email resume to careers@fosterandmotley.com. All inquiries will be held in the strictest confidence.