Financial Planning Associate

Full-Time

Responsibilities

- Responsible for preparing for client review meetings by updating/completing client information, organizing and printing out appropriate reports and financial planning deliverables, and providing necessary follow-up.
- Attends and participates in client review meetings with Advisor as requested.
- Responsible for the review of all client meetings to ensure all follow-up and action items are completed.
- Efficiently communicates and corresponds, in a timely manner, with team on any items to be completed such as trades, new accounts, paperwork, appointments, and other items specified by Advisor.
- Acts as the Team's “go-to” for client meeting related information.
- Pro-actively provides follow-up with clients on open items and questions. Summarizes client meetings and calls with re-cap letter.
- Maintains communication with client during the financial planning process. Answers client inquiries and provides readily available planning information to clients, if requested and as allowable, as it relates to servicing their accounts.

Qualifications:

- Active listener with a high level of attention to detail
- Ability to multi-task, prioritize, and work in a fast-paced office environment
- Bachelor's Degree in Finance or related area of study
- 2+ years of experience or internship in the financial services industry
- Series 7, 66, and New York Life & Health Insurance Licensed
- Excellent written and oral communication skills
- Working knowledge of Word, Excel, and PowerPoint
- Strong aptitude for taking complex situations and breaking them down into simple concepts
- Be team oriented and respectful of others

Benefits:

- Opportunity to be a part of a top performing, growth oriented, and cohesive team
- Competitive salary and benefits

About Rocco A. Carriero Wealth Partners

At Rocco A. Carriero Wealth Partners, a financial advisory practice of Ameriprise Financial Services, Inc., our mission is to make a positive difference in the lives of our clients by simplifying and organizing their complex financial lives.

Rocco A. Carriero Wealth Partners is within the Top 1.5% of Ameriprise Advisors and has received multiple awards recognizing their experience in the financial services industry (Long Island Business News Experienced Advisor Award, 2015) and support of their local community (Advisors with Heart Award, 2015).

All members of our team adhere to and pride themselves on exhibiting our six Core Values:

- Continually strive for perfection
- Service the client above all else
- Exhibit professionalism
- Growth Oriented
- Treat everyone with respect
- Help others in our community

Please email resumes to Lauren.lucas@ampf.com