



Available: Immediately
Deadline: Until Position is Filled
Contact: Richard Durso
Email: careers@rtdfinancial.com

RTD Financial Advisors, Inc. is a Financial Life Planning™ firm, headquartered in Center City, Philadelphia. We are a progressively growing firm, offering an exciting place to work and a well-defined career path. We strive for a team-oriented culture with a commitment to the highest levels of ethics and client service.

We are seeking an Associate Financial Planner in our Philadelphia, PA office. This position offers the right candidate an amazing opportunity to build a client base and enjoy a career, shaping the future of a highly committed and cutting-edge financial planning firm. Candidates should *passionately* believe that client interests always come first.

Key Qualifications and Characteristics

- Seeking a defined career path in financial planning
- At least 2-3 years of financial planning experience
- Hold CFP® designation (or satisfied the full coursework from a Certified Financial Planner™ program)
- B.A. or B.S. degree from accredited four year university
- Strong verbal and written communication skills
- Very organized, with acute attention to detail
- Must be a self-starter, problem solver and a goal-oriented team player with a ‘no job is beneath me’ attitude
- Genuinely caring by nature
- Empathizes and listens to clients
- Demonstrates curiosity and confidence when dealing with clients and support team
- Experience working with Microsoft Office Suite, eMoney Advisor, Junxure

Responsibilities

- Contribute to the Financial Planning Process using RTD’s Discover, Plan, Live Approach
- Participate in client meetings and maintain relationships through regular communication
- Contact clients to schedule financial planning meetings.
- Complete follow-up communication and implementation of actions that result from client meetings
- Prepare meeting notes to send to clients
- Update database with notes and actions
- Communicate with client’s outside advisors such as accountants and attorneys
- Receive inbound client phone calls and emails, either addressing their needs or directing them to the appropriate team member
- Collaborate with planners and support staff for meeting preparation
- Participate in firm’s various committees in pursuit of the company’s goals
- Continue our firm’s history of giving back/volunteering by enthusiastically participating in the growth of our profession through industry associations such as FPA and NAPFA

Salary and Benefits

- Competitive salary with bonus opportunities
- Annual incentive based on merit and the profitability of the firm
- Health and dental insurance (50% company-paid)
- Group long-term disability insurance (100% company-paid)
- 401(k) plan with discretionary Profit Sharing contribution (historically 2%-3% of annual base salary)
- Continuing education allowance
- Generous paid time off and holiday schedule

To Apply

Please send your cover letter, resume and answers to the following short essay questions (500 word maximum per question) to careers@rtdfinancial.com. All documents should be combined into one file and submitted in PDF format with the filename containing your first and last name - **No Phone Calls!**

1. Why would you like to work for RTD?
2. What would you bring to RTD that is unique?
3. What does it mean to you to put your client's interest first?
4. What is the most interesting thing you know about Philadelphia, PA?