Senior Financial Planner

About Us:
Hokanson Associates was established in 1987 and is one of the area's best known and most highly regarded independent wealth management firms. Our team of investment, tax, and financial planning specialists gives us the depth of expertise to provide comprehensive wealth management services to high net worth families in the San Diego area. For additional information about our Firm, please visit our website at: www.hokansonassociates.com.

Position Description:
The Senior Financial Planner must have the education, experience, sound judgment and warm personality to work with and provide advanced financial planning and wealth management counsel to the Firm's high net worth clientele. In addition, this individual must work effectively in an open team environment and support all of their co-workers in executing the Firm's mission. As is the case with any small business, the Planner must be willing to be flexible and share the myriad of responsibilities that make a small firm succeed as they may be assigned. Any applicant must understand that complete integrity and unimpeachable ethical behavior are non-negotiable traits for this position.

Key Responsibilities –

Senior Financial Planner

- Proactively ensure that our clients' financial planning needs are addressed promptly, thoroughly and efficiently.
- Responsible to ensure that the organization can address our clients' technically advanced planning issues – tax, legal, business, etc.
- Communicate effectively with all co-workers and share information with the goal of constantly improving and standardizing our financial planning "best practices."
- Working with all co-workers to improve the tools, management, processes and execution of our service to our clients.

Business Development

- Business development duties include interacting with a client's other professionals, getting involved in the community, meeting with professionals and clients, telling our "story" to those who don't know us and asking for referrals where appropriate.
- Participate in prospective client meetings or Firm events as requested.

Other duties as assigned

- As the Firm grows and evolves, this person must be flexible and willing to face new assignments and challenges that management determines may be beneficial to our clients, our fellow co-workers and the Firm generally.

Qualifications:

- College degree, plus certification as a CFP, and preferably a CPA, or equivalent designation
- Minimum of 10 years as a professional financial planning practitioner
- No adverse professional or regulatory history

Scheduled hours are 7AM to 4PM, Monday through Friday.

If this sounds like a fit for you, please send resume to:
employment@hokansonassociates.com. NO PHONE CALLS PLEASE.