Wealth Planner / Financial Planning Associate

Jacksonville, FL · Full-time · **$70k–100k**

Wealth Planner / Financial Planning Associate
CFP coursework completed or in progress | CFP-certified candidates welcome
Location: Jacksonville, FL
Salary: $70,000–$100,000 (depending on experience and credentials) + Benefits
Benefits: Health, Dental, Vision, 401(k) with match, PTO, Professional Development Support
Job Type: Full-Time | On-site
Typical Hours: Monday–Friday, 40–45 hours/week
Start Date: ASAP
Sponsorship is not available

Wealth Planner / Financial Planning Associate Description

Our client in the wealth management industry is looking for a Wealth Planner / Financial Planning Associate in Jacksonville, FL. This position combines substantial hands-on financial plan preparation with opportunities to participate in client meetings and support advisor recommendations. You will gather and analyze client information, work within financial planning systems to build and refine detailed plans, and help the firm's advisors deliver thoughtful guidance across investments, retirement, tax, estate, and risk planning. You will work closely with the firm's owner and internal team. This is not a cold-calling or book-of-business development role. The firm is open to experienced planners as well as recent or upcoming graduates who have completed or are nearing completion of CFP coursework and are eager to develop through hands-on planning work. Success requires careful analytical work, attention to detail, and the confidence and interpersonal skills to contribute professionally in client meetings. Over time, you'll gain the autonomy to shape your path within a collaborative firm that values initiative, precision, and strategic thinking. Your ideas will be heard and your impact will be visible.

Wealth Planner / Financial Planning Associate Responsibilities

- Build, update, and refine detailed financial plans within financial planning software for advisor review
- Collect, and verify client information, financial statements, account details, and planning assumptions
- Analyze cash flow, assets, liabilities, investment allocations, retirement needs, and risk exposure
- Develop scenarios, calculations, and concise recommendations for retirement, tax, estate, and insurance
- Check plans, inputs, reports, and supporting documents for completeness and accuracy
- Participate in client meetings, communicate professionally, take notes, and coordinate follow-up items
- Partner with advisors to prepare and present planning recommendations and respond to client needs
- Maintain accurate client records and planning updates in the CRM and planning platforms
- Collaborate with colleagues to keep planning deliverables and client follow-up on track

Wealth Planner / Financial Planning Associate Qualifications

- Bachelor's degree completed or expected by start date required
- CFP certification or completion/progress toward CFP coursework required

- Foundational knowledge of investments, retirement, tax, and estate planning required
- Strong interest in hands-on financial plan preparation and analysis required
- Confident, personable communicator with strong client-facing potential
- Strong analytical, organizational, and attention-to-detail skills required
- Proficiency in MS Office required; financial planning software experience preferred

Apply: https://twonice.hire.trakstar.com/jobs/fk0zzcp/?apply=true

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