



## **Job Title: Financial Planner**

### **JOB DESCRIPTION**

Los Angeles-based investment advisory firm is seeking an experienced Financial Planner to work closely with new and existing clients to deliver comprehensive financial planning services. Clients include high-net-worth individuals and families, pension plans and non-profits. Westmount is one of the oldest and largest independent RIA firms in Los Angeles, with almost \$3 billion in assets under management.

### **Responsibilities:**

1. Work with Director of Financial Planning and Portfolio Managers to deliver comprehensive financial planning to clients and prospects
  - Assist in gathering data, organizing client information
  - Construct financial plans by entering data into eMoney
  - Updating existing financial plans
  - Deliver financial plans to clients/participate in meetings
2. Research miscellaneous financial planning questions/topics
3. Undertake special projects (e.g., plan tracking, department metric analysis, etc.) on an “as needed” basis

### **Requirements:**

- 3-5 years of experience in comprehensive financial planning
- Experience with eMoney preferred
- Bachelor’s degree (prefer accounting, finance or related field)
- CFP designation preferred (or expected to obtain within 2 years of hire)
- Client-facing experience with high net worth clients
- Strong organizational skills including the ability to handle multiple tasks and shifting priorities
- Demonstrated strong presentation, analytical skills and attention to detail