



## **Job Title: Senior Financial Planner**

### **Job Description**

Los Angeles-based investment advisory firm is seeking an experienced Senior Financial Planner to work closely with new and existing clients to deliver comprehensive financial planning services. The position requires heavy client interaction and the ability to lead client meetings.

Established in 1990, Westmount is one of the oldest and largest independent RIA firms in Los Angeles, with approximately \$3.5 billion in assets under management. Our clients include high-net-worth individuals and families, non-profits and pension plans.

### **Responsibilities**

1. Work with Senior Advisors of the firm to deliver comprehensive financial planning to clients and prospects. The day-to-day includes:
  - Gathering data and organizing client information;
  - Constructing financial plans by entering data into eMoney;
  - Updating existing financial plans;
  - Delivering financial plans to clients;
  - Mentoring Associates of the firm on the financial planning process and topics.
2. Research miscellaneous financial planning questions/topics.
3. Undertake special projects (e.g., plan tracking, department metric analysis, etc.) on an as-needed basis.
4. Operate as a resource to the firm on financial planning topics.

### **Requirements**

- Minimum of five years of experience in comprehensive financial planning.
- Broad knowledge of all aspects of financial planning, including tax, estate planning, insurance, etc.
- Experience with eMoney preferred.
- Bachelor's degree, preferably in accounting, finance or a related field.
- CFP designation required. Other certifications (CPA, JD) desirable.
- Client-facing experience with high net worth clients.
- Strong organizational skills including the ability to handle multiple tasks and shifting priorities.
- Demonstrated strong presentation and communication abilities, analytical skills and attention to detail.