LISA BRIGNONI
Manager of Portfolio Operations

Job Description

Job Title: Financial Planning Analyst

Reports to: Manager of Portfolio Operations

Essential duties and responsibilities include but are not limited to the following:

• Supports advisors in our investment advisory and retirement services department in providing ethical, objective and holistic financial planning advice to clients and prospects.
• Provides asset allocation recommendations based on the guidance of the centralized portfolio management team.
• Completes annual portfolio reviews for all clients for advisors in the department.
• Supports in departmental projects with advisors and portfolio management as needed.
• Pursues expertise in the following financial planning topics: investment management, tax planning, cash flow planning, education expense planning, insurance gap analysis, annuities and generational transfers.
• Pursues a comprehensive knowledge of economic news, investment analysis and current events as they relate to financial planning and portfolio management.
• Documents all client interaction and firm activity within designated client relationship management (CRM) system.
• Promotes and participates in firm-sponsored events.
• Engages in networking opportunities to promote further growth of FFA.
• Communicates effectively with team members and assumes responsibilities for outcomes.
• Maintains required licenses and updates continuing education in a timely manner.
• Presents oneself in a professional manner both at work and outside of the office, including client events.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
• Bachelor’s degree, preferably in finance/economics
• Series 7 and 66 certifications – ability to obtain after starting position
• CFP® or progress towards certification preferred
• Insurance license
• 1-3 years experience in financial planning or other related investment management area.

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Work Environment

FFA has been repeatedly recognized as a top place to work because of its collegial work environment and focus on service to clients and each other. Ability to work in a collaborative, fast-paced, entrepreneurial environment will be a critical success factor for a Financial Planning Consultant. As a member of an effective client management team, he/she will be expected to work closely with advisors, portfolio analysts and client account specialists to effectively manage all client needs and expectations.

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