monte FINANCIAL GROUP

FINANCIAL PLANNING ASSOCIATE

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team implements a team-based approach to servicing our clients across two business segments: Wealth Management and Asset Management. We are currently looking for a Financial Planning Associate (FPA) to join our advisor team and grow with the firm as we continue to expand and serve our clients.

JOB SUMMARY

As a Financial Planning Associate, you will be a part of the firm's advisor team. This position is onsite, located at our Guilford, CT office. As an entry-level role, it represents the initial step in our developmental program, designed to set you on a path toward becoming a Wealth Advisor and achieving CERTIFIED FINANCIAL PLANNER™ (CFP®) certification.

The FPA will support the firm's Wealth Advisors by assisting in the development of comprehensive financial needs analyses, proactively conducting client analyses, and preparing targeted financial planning insights. Responsibilities also include participating in client meetings and maintaining strong client relationships through ongoing support and timely follow-ups on action items.

KEY ACCOUNTABILITIES

- Assist advisors in completing comprehensive financial needs analysis by preparing base plans and participating in scenario analysis.
- Support proactive client relationship management by conducting client analysis and preparing targeted financial needs analysis using the firm's financial planning software.
- Collaborate with advisors, client service, and asset management teams to support the firm's team-based approach.
- Complete assigned responsibilities accurately and within established timelines.
- Communicate professionally and effectively with clients via email, phone, and client portal systems.
- Draft high-quality follow-up communications and respond promptly to client inquiries.
- Support advisors throughout the client meeting process by managing follow-up communications and participating in client discussions when appropriate.
- Maintain accurate and up-to-date client data across firm systems and platforms.
- Actively contribute to internal team meetings and ongoing operational alignment.

QUALIFICATIONS

- Highly organized and detail-oriented, able to manage multiple tasks and support several advisors effectively.
- Responsive and effective communicator, both verbally and in writing.
- Uphold strong ethical standards with a steadfast commitment to maintaining the confidentiality of sensitive client and firm information.
- Emotionally intelligent and self-aware, skilled in building effective relationships with team members and serving a diverse client base.
- Eager to learn and grow within the industry and the firm, thriving in a dynamic, fast-paced environment.
- Tech-savvy, quick to learn new tools, platforms, and financial software.
- Able to work independently while also collaborating effectively as part of a team.
- Flexible and adaptable, able to meet tight deadlines and adjust to changing client needs.

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Entry-level
- BA/BS degree
- Proficient in Microsoft Office
- Minimum GPA of 3.0
- Must have Series 65 or pass within the first 6 months of employment

HOW TO APPLY

For further inquiry, please email **madelyn.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.