LODESTAR
PRIVATE ASSET MANAGEMENT

Financial Planner

Lodestar Private Asset Management

We are an independent, fee-only Wealth Management firm in Alamo, CA (San Francisco Bay Area), seeking a Financial Planner to join our collaborative, growing team.

Our firm provides comprehensive, holistic, financial planning and investment management services for individuals, families, and business owners. We believe that every individual can benefit from some level of financial advice, planning or management help. While most of our clients need ongoing financial planning and investment management services, other clients we work with can greatly benefit from a limited, focused engagement based on their situation. For that reason, we work with clients under one of two arrangements:

- Ongoing Financial Management (AUM model) – ongoing asset management, comprehensive financial planning, and advice year-around on any financial-related topics.
- Hourly Advice & Comprehensive Financial Plans (Hourly Fee model) – financial consultations and customized financial plans that clients implement themselves.

Who We're Looking For

This position will assist in the creation of complex and comprehensive financial recommendations. They will be involved in the entire client engagement and encouraged to grow into a Senior Financial Planner to eventually lead client relationships. This is not a business development role; you will be given client relationships over time in a collaborative environment that fosters mentorship.

Key Traits of the Ideal Candidate

- Connects with Others – others should feel comfortable opening up to you and sharing personal details and feelings around their situation.

- Analyzes Facts and Feelings – analyzing facts and figures is important, but you also should be skilled in reading non-verbal cues to relate most effectively with clients.

- Delivers Logic with Compassion – logical financial advice is more effective when it is delivered in a warm and caring environment that you should help create.

- Improves the Team – when processes or situations can be improved, you should take calculated action, aiming to put everyone around you in a better position.

- Learns and Shares Knowledge – you should be naturally curious and driven to learn, and you should enjoy sharing your knowledge with others in ways that help them improve their lives.

- Craves Feedback – direct feedback from trusted peers helps us advance quickly and gracefully. You should view each meeting or situation as an opportunity to learn.

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Initial Responsibilities

- Participate in client meetings
- Collect, organize, and synthesize personal and financial client information
- Analyze clients' financial planning needs
- Act as a concierge for clients to help them execute important tasks
- Create deliverables for meetings and other engagements
- Continuously monitor clients' financial situations with detail and accuracy
- Be available to field ad hoc planning questions from clients
- Conduct research projects for the company and its clients
- Participate in company meetings and help influence company-wide decisions
- Improve firm operations by creating and completing internal projects

Additional Qualifications (but not mandatory)

- Experience working at a financial planning or tax-related firm
- Meaningful experience with the following:
  - MoneyGuidePro, financial reporting tools (Orion, Tamarac, etc.), or any other financial planning-related software
  - Mentoring and teaching
- Preference given to candidates with (or pursuing) CFP®, CPA, or EA
- Intelligence, with a strong attention to detail (e.g., solves puzzles with each person's unique situation as focal points)
- Demonstrated academic achievement (e.g., high GPA, etc.)
- Demonstrated passion for helping others (e.g., charity involvement or work)

Benefits

- Competitive salary with bonus incentive structure
- 401(k) with employer matching contributions
- Health, dental, and vision insurance
- Continuing Education – paid professional dues, CE credits and workshops, training budget, etc.
- Significant career growth opportunity in a collaborative team environment

To apply, please email Bryan Hasling (bryan@lodestarpam.com) and include:

- Your resume and cover letter, as well any attachments or links that may help us learn more about you (e.g. LinkedIn, publications, blogs, etc.)