



**ALBION  
FINANCIAL  
GROUP**

Guiding clients to  
a lifetime of good  
financial decisions

## **Financial Planner**

### **Albion Financial Group – Salt Lake City**

Albion Financial Group is an independent fee-only wealth management firm located in Salt Lake City. The firm was started 35 years ago in Alta, Utah. Today we are a team of 25 employees, work with approximately 450 families, and have \$1 billion in assets under management. Our mission at Albion Financial Group is to help our clients make a lifetime of good financial decisions.

Albion Financial Group is a team-oriented workplace. We believe we can best serve our clients by using collective efforts. We have a progressive work place that prides itself on giving back to the community. We provide professional development opportunities, ongoing training, and continuing education. We are seeking a Financial Planner to assist us in our mission of helping clients achieve their financial goals. This candidate will work directly with our Senior Wealth Advisors as well as other members of our team to create high quality custom financial plans for our clients. If you have a desire to be part of a successful team and share our vision, then we want to hear from you.

#### **Duties and Responsibilities:**

- Professionally communicate with high net worth clients (in writing, verbally, and in person)
- Review, interpret, and summarize client data including insurance contracts, tax returns, and employee benefit information for input into planning software
- Help clients with online data input and web access
- Build comprehensive cash flow plans
- Work closely with a Senior Wealth Advisor to share plan information
- Participate and assist a Senior Wealth Advisor with client meetings including preparation and follow-up

#### **Key Qualifications:**

- A CFP® or working toward CFP® designation
- Outstanding organization skills and ability to manage and balance multiple projects simultaneously
- Excellent verbal, written, presentation and interpersonal communication skills
- Self-starter, problem solver, and goal-oriented team player
- Experience with eMoney is a plus

Salary and benefits discussion upon interview.