

Investment & Planning Advisor

Company [Paladin Advisors](#) is a sophisticated and rapidly-growing investment advisory firm that serves private and institutional clients on a fee-only basis. Our corporate culture promotes excellence, accountability, transparency, and humility. We take a team approach to supporting clients and solving problems.

Position The Investment & Planning Advisor will assume a prominent role in our client service and financial planning work. Our advisors proactively engage clients in discussion of their personal circumstances and long-term goals. The Advisor will apply these insights, in conjunction with deep knowledge of the elements of financial planning (investments, insurance, taxes and retirement modeling) to build sound financial and investment plans for Paladin clients. The Advisor will communicate regularly with other advisors and subject-matter experts on the Paladin team to enhance our service offerings and ensure our clients' peace of mind.

This is a full-time position with the opportunity for advancement into a senior role. The salary is competitive and there is an opportunity for equity ownership in the firm.

Qualifications Qualified candidates will possess the following skills and traits:

- 5-7 years of financial advisory and planning experience
- Expertise in and a passion for financial planning (CFP required)
- Ability and sincere desire to cultivate client relationships and deeply understand their financial circumstances
- Exceptional analytical and communication skills
- Experience with a variety of financial planning programs
- Advanced skills in Microsoft excel
- A willingness to support the team in operational tasks
- Interest in working closely with a small, collaborative team

Contact Please appraise your skills candidly and, if you believe you are suitable for the role, send a cover letter and resume to Karen Parker Feld (info@paladinadvisors.com)