



Financial Planner - Position Description

Summary:

Szarka Financial Management (SFM) has been serving individuals, large companies, small businesses, unions and communities in the Greater Cleveland area since 1985. We differ from our competitors in many ways. First, we are a planning firm - not a sales organization. We work in our clients' best interests and solely for them. Second, we provide a team approach, providing personal attention every step of the way. At SFM, all clients are counseled in the same manner and receive the same innovative level of advice and hands-on, personalized service. Third, we provide customized solutions for our clients - not a "cookie cutter" approach to financial planning.

As a result of our growing success, we are seeking a dynamic individual whose success is the direct result of building strong relationships with prospects, clients and centers of influence. The ideal candidate will have the ability to develop new relationships through quality referrals from existing clients, centers of influence and effective presentation of financial education programs.

Responsibilities:

- Supporting the expressed Vision, Mission, Goals and Objectives of the company
- Developing strong relationships with prospects, centers of influence and all assigned clients
- Establishing credibility as financial planning expert in a specific field of interest (i.e. retirement planning, estate planning, tax planning, working with small business owners, etc.)

Duties:

- Meet with clients annually to perform review of financial plan/portfolio
- Build client base through referrals and networking
- Follow SFM Client Servicing Matrix resulting in consistent, quality client management
- Present financial education programs to employees of client companies and clients of outplacement organizations

Qualifications:

- Minimum five years experience as financial planning professional
- Bachelor's degree
- Group workshop/adult education teaching experience
- Formal sales training or experience
- Excellent communication skills
- Proficiency in Windows XP, Internet Explorer, MS Office - Word, Excel, PowerPoint

Certifications & Licenses:

- CFP®, CPA, JD preferred or in process of obtaining financial professional designation
- Series 7/63/65, and Life, Health, Variable Annuity Insurance licensing