Financial Planner

Ancora is seeking a Financial Planner whose primary job function is to analyze, develop and implement financial plans for a select group of Ancora's existing clients and prospects. The candidate will mainly serve as the planner on relationships with individuals and families who have a net worth in the $1M - $10M range. This individual will be on the client-facing relationship team and be a trusted advisor to the clients that they serve.

Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio, office.

Duties & Responsibilities

Financial Planning

- Gather and analyze clients' financial circumstances and data. This includes assets, liabilities, cash flow needs, insurance, tax status, insurance estate documents/plan and financial objectives.
- Acquire a deep understanding of planning software, including new software or products that may become available to the firm.
- Develop a timely, customized financial plan using our planning software tools based on analysis of data.
- Deliver completed or updated plans directly to the client via live in-person presentation or interactive video call. Use this process to develop and implement next steps for the client based on their needs and goals.
- Seek out and recommend opportunities that add value through efficient savings, prioritization of debt, tax efficient planning, etc.

Internal Relationships / Partnerships

- Work as a teammate with firm Relationship Managers to provide support and planning services to new prospects and clients.
- Work closely with Portfolio Managers to integrate the financial plan with their customized portfolio that meets the client's needs based on the planning exercise.
- Work closely with operations as needed to set up new accounts, coordinate distributions or contributions.
- Work collaboratively with other members of the planning team to maximize efficiency of service to our clients.
- Contribute to the internal financial planning education programs and other written pieces for newsletters or marketing needs.

Client Management

- Develop and maintain trusted relationships with the clients that you service.
- Respond accurately and efficiently to client needs and questions.
- Update and modify existing plans as circumstances change.
- Develop a system of organization for keeping up to date on existing client plans and necessary/timely follow-up.
- Create, prepare and distribute other client reporting as needed.

Business Development / Business Referrals

- Make referrals to attorneys, tax professionals and other providers, as needed.
- New Business Development encouraged across services provided by Ancora.

Qualifications

- Bachelor's degree required, Law or Master's degree preferred
- 3 - 5 years of Financial Planning experience
- Work experience in a client facing role
- Estate planning and tax preparation experience preferred
- CFP® license preferred
- Experience with MoneyGuide Pro and eMoney or other relevant planning software preferred

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

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