



Financial Planning Resident

POSITION: Financial Planning Resident with Mindful Asset Planning in Apple Valley, MN

Who are we? Mindful Asset Planning (MAP) is a comprehensive financial planning and fee-only fiduciary firm that always acts in our clients' best interest. MAP provides customized personal financial planning advice to individuals, families, and businesses. Established in 1988, MAP has acquired the depth of knowledge and experience necessary to inspire clients of all ages and economic stages of their lives who seek a significant benefit from expert guidance.

MAP's unique comprehensive planning process integrates a therapeutic approach to provide both financial and human asset strategies for the best experience for clients. MAP combines an encouraging process with technical guidance on many issues including: saving and spending, accumulation, debt strategies, education planning, tax strategies, retirement planning, risk management, investment strategies, estate planning, and lifetime gifting.

How are we different than other financial planning firms? MAP differs from most advisors because as a fiduciary, we are paid directly by our clients and do not accept commissions or payments from outside sources. Our focus is always on the best possible result for our clients' financial success and well-being by providing guidance and counseling while avoiding conflicts of interest.

Why would you want to work at MAP? We are an industry-leading team of financial planners, having attained numerous designations and certifications based on our comprehensive and nurturing approach to financial planning. The MAP team is comprised of a wide range of experience from the Founders through the 2nd generation Planning and Operations team, and Residents starting their careers. We are authentic, value loyalty and hard work, and are looking for others who are committed to achieving positive outcomes for our clients and fellow team members.

Who are we looking for? MAP is currently searching for a Financial Planning Resident, who has a strong passion for helping others. We are seeking someone who is organized, detail-oriented and analytical with a friendly, caring, and compassionate personality towards people. The right candidate is motivated to help others achieve their best, encourages open communication, takes initiative, and provides leadership to help each other and our clients. We prefer someone who is driven by results and brings enthusiasm to the job each day. All MAP employees work on a variety of tasks and seek opportunities to grow and improve.

Explanation of Residency Program

A Financial Planning Resident position will be a life-changing experience for the right candidate. Candidates will learn how to be a financial planner within an experienced and well-developed team. Candidates will experience all areas of the CFP® planning process beginning with initial exploratory conversations and following through with financial evaluation, implementation, and ongoing support of clients. Job duties are designed to build a foundation for a successful financial planning career and provide the experience necessary to qualify to be a CFP® Certificant. The candidate will be supported and expected to attend professional association events as well as prepare for and take the CFP® Exam. The Candidate will be treated and have the same expectations as other MAP employees.

Job Description

The Resident will receive training in three areas of financial planning: client services and operations, investment strategies, and the financial planning process. Your job responsibilities will be based on the area of focus. Each focus will last approximately one year. Over the course of your residency, you will receive continued training to be able to independently do the following tasks and other duties as assigned:

- Financial planning preparation for clients
- Gathering client information
- Creating financial analysis and projections



Financial Planning Resident

- Prepare client documents and information for meetings
- Create & review client goal summaries
- Review client presentations
- Record & write summaries of notes in client meetings
- Practice written and verbal communication with clients
- Prepare, process, and confirm client paperwork
- Process investment changes in client accounts
- Monitor client goal progress/completion of tasks

Qualifications include:

- 4-year degree in a field suitable to meet the education requirements to qualify to be a CFP® Designee (CFP® coursework need not yet be completed) (required)
- Strong understanding of Windows based systems with proficiency in Microsoft Excel, Word & Outlook
- Ability to quickly learn new software systems essential to your role and responsibilities (CRM, Microsoft 365, Morningstar, Adobe Suite, DocuSign, iRebal, etc.)
- Excellent verbal and written communication skills are essential for interaction with clients and teammates
- Problem solving, analytical, and critical thinking skills with a high attention to technical accuracy
- Highly motivated individual who takes initiative and works independently to manage workload
- Ability to multi-task and manage competing priorities

Compensation & Benefits

- Full-time salaried position with compensation relative to experience and education
- Quarterly revenue sharing compensation after one year of employment
- Retirement plan with company contribution
- Required training and continuing education costs paid by MAP
- Employer paid Long Term Disability coverage
- Paid Time Off, Sick Time and Holidays
- Flexible work arrangements based on job proficiency
- Employer assistance with health insurance

Anticipated Outcomes of Residency Program

Proficiency with software tools such as CRM, planning tools, portfolio analysis, Word, Excel, Outlook, and tax tools. Written and verbal skills with effective communication with clients and staff. Focused task management and objective/goal achievement. Understanding of the principles and methodology of comprehensive financial planning and awareness of the psychology and emotions around financial preferences, habits, and decision-making.

The position will end after approximately 36 months. At that time, the Financial Planning Resident is anticipated to be highly qualified to move on to another position. If Mindful Asset Planning has an open position at that time an established successful Financial Planning Resident will be *encouraged* to apply. Should Mindful Asset Planning not have an open position at that time the firm will support the Financial Planning Resident's objective of finding a desired position with another organization.

To apply, please send a cover letter and resume in PDF format to: careers@mindfulplanning.com