POSITION SUMMARY: Gateway Advisory is seeking a Financial Planner to support our financial advisors with their financial planning needs.

Gateway Advisory is a growing wealth management firm, locally owned with offices based in Toms River and Westfield, New Jersey.

We are a fee-only, fiduciary and Registered Investment Advisor firm providing Investment and Financial Advisory services to high-net worth families.

The primary responsibility of the Financial Planner is to provide assistance to the firms' Wealth/Relationship Managers.

Job Description:

Responsibilities include, but are not limited to, the following:

- Work with Senior Advisors to analyze, research, and implement financial solutions with clients
- Meet with clients along with Senior Advisors to present analyses and recommendations
- Prepare meeting agendas, recaps and draft recommendations
- Creating and maintaining client files, spreadsheets, and correspondence
- Creating/updating/maintaining client balance sheet and cash flow statements
- Coordinating communication between clients' professionals i.e., accountants and attorneys
- Following-up on client service issues as needed
- Fielding in-bound calls if needed
- Performing various miscellaneous tasks as assigned

Job Requirements:

The Ideal Candidate will possess the following:

Knowledge, Skills and Abilities:

- Proficient in financial planning software i.e., MoneyGuidePro
- Ability to quickly build relationships; understand and analyze client needs
- Strong attention to detail to ensure accuracy and completeness of work
- Ability to work cooperatively in a team environment as well as independently
- Be viewed as a team player by associates and possess a positive upbeat attitude
- Possess excellent people skills
- Strong inter-personal, verbal and written communication skills
- Ability to identify, research and resolve problems in a timely manner
- Strong computer skills including proficiency in Excel, Word and PowerPoint

- Strong organizational and time management skills
- Ability to prioritize, manage and complete requests from multiple sources
- Takes initiative to research and resolve issues
- Proficient with documenting progress and tasks in CRM (Salesforce) so that team members can track status of cases

Education and Experience:

- Preferred 2-3 years' or more of professional work experience
- Bachelor's Degree from a four-year college or University
- Has obtained or in the process of attaining the Certified Financial Planner™ (CFP®) designation
- Candidate should be a motivated independent thinker with ethical standards that is interested in working in a fast paced, entrepreneurial setting

Compensation:

- We offer a competitive salary, advancement potential and training opportunities
- Benefits include Health, Dental and Life insurance as well as a 401(k) plan with employer match

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