

## CAISSA Wealth Associate Planner

Caissa Wealth Strategies serves affluent clients in their wealth management needs. We focus on financial planning, starting with the tax return, which drives our detailed investment management strategies. Our best client is the one who allows us to get into every detail of their financial future, integrate that detail and plan multiple steps ahead. Our [Torpedo Proofing](#) and [Tranches of Income](#) processes set CAISSA apart from other advisors, providing our clients the structure to make it through retirement in any market environment (check them out on our website!). Clients hire CAISSA to remove their financial anxieties by taking the role of their personal CFO. The role of the Associate Planner is very integral in this high level of client service. This role will have rapid advancement.

Our firm has grown rapidly and we are looking to welcome an additional Associate Planner to the team. As The Associate Planner you would be responsible for a set of designated CAISSA clients. These clients require a high level of financial planning, relationship management and client service.

Email your resume to [Kelly@caissawealth.com](mailto:Kelly@caissawealth.com)

Check us out at: [www.CaissaWealth.com](http://www.CaissaWealth.com)

### CAISSA team members have these fundamental characteristics:

**Independent Thinker:** You are a team player that is able to think independently, bringing your critical thinking/analysis back to the team. You enjoy high level direction but don't need to be instructed every step of the way.

**Relationships:** You thrive on developing relationships and creating good outcomes. You are able to communicate confidently but empathetically to deepen relationships with colleagues as well as clients.

**Appreciation:** You love to connect with your co-workers and have a laugh with them while getting the work accomplished at the same time. Knowing when to pause for some personal connection yet put your nose to the grindstone is a strength of yours. You thrive on appreciation but do not need it constantly to survive. Confidence is a strength that allows you to absorb direct feedback and direction, turning it into something constructive.

**Utility Player:** You enjoy learning, change, growth and opportunity. You thrive in a smaller environment where you can make a strong stamp on the future and also be part of building it. Corporate world is likely too regimented for you and you like to be part of the decision making. Often you may wear multiple hats to drive the cause forward even if it's not a primary function of your role.

**Greater Good:** You understand the vision of CAISSA and want to do anything to project that forward. The clients need us to look out for their best interest, ALWAYS. This may mean working on a client a few more hours, spending time connecting with them on issues and always going beyond their expectations so that we are providing an unmatched level of service.

### Associate Planner Role

You will be working directly with our Director of Financial Planning and our Chief Investment Officer to provide financial planning and analysis for client relationships. You are skilled in creating detailed financial plans (based on taxes) by analyzing financial data provided to us. You will be responsible for a client from the point they have transferred in throughout the financial plan and follow up process. This includes tracking processes in Junxure. A smaller portion of your time will be spent procuring investment analytics for our investment process and some projects that may go along with that. You have an understanding of investments and are eager to learn new processes to help the investment team make integral decisions for your clients' portfolios. However, you won't necessarily be responsible for the investments.

You are an expert in word, excel and PowerPoint and have a proficiency in financial planning software (preferably Naviplan, the software we use). You are familiar with Morningstar and Junxure or are willing to learn and complete those processes. You have a good understanding of concepts related to taxes, retirement plans and estate planning. You have good communication skills to be able to talk to clients in great times and poor times, discuss issues with our team and keep the important client actions front of mind for team members.

Much of the gusto in our team members comes through life experiences that cannot be taught, you just have them. You are a person that can take the ball from A to Z but also know when to check yourself. You understand that hard work yields reward and you look forward to challenges and personal growth. The rest, we can teach you.

### Skillsets:

The main responsibilities would be to:

- Analyze financial information and create the financial plans
- Be responsible for the client relationship process
- Support our investment advisors in some research analytics

The Associate Planner has the knowledge and skill sets as follows:

- A CFP® with 3-4 years of experience looking to take over a preset book of clients
- Values and drive that align with CAISSA
- Proficiency in financial planning software (preferably Naviplan), excel, and Junxure
- The ability to read a tax return (or enthusiasm to learn)
- Working knowledge of Morningstar
- Is a clear communicator with confidence, humility and empathy
- Able to commit to getting a job done if it requires long hours knowing there is reprieve thereafter
- Ability to think independently, make decisions and be a creator
- Is a team player, able to wear a variety of hats if needed

### Education:

- Bachelors degree in Finance, Economics or Accounting
- CFP® with an emphasis in tax
- Has their Series 65 license and an understanding of investment fundamentals