



Ann Arbor, Michigan  
www.exchangecapital.com

### **Job Description: Financial Planning Associate**

Exchange Capital Management, a boutique, fiduciary, fee-only wealth management firm in Ann Arbor, Michigan, is seeking a Financial Planning Associate. You will be a part of a close-knit team that values learning, process, client service, and open communication.

In addition to a competitive base salary and discretionary bonus, you will enjoy a 401(k) plan with an employer match, health insurance with HSA and FSA options, opportunities for professional development, a flexible vacation policy, and more.

### **Responsibilities**

- Provide analytical support for the firm's Investment Advisors
  - Gather data utilizing internal systems and through direct communication with clients
  - Develop financial plans with analysis of data and outcomes
  - Present financial plan information to lead advisor including strengths, weaknesses, and recommendations
  - Maintain CRM records and other internal databases to document our compliance with the law and the commitments we have made to our clients
- Client Support
  - Participate in client review meetings with Investment Advisors
  - Collect factual data and paperwork from clients
  - Assist clients with our online financial planning and reporting software
- Marketing
  - Review and comment on blogs posts written by others
  - Perform research that can be used in media pitches, blogs, white papers, etc.
- Special Projects

### **Requirements**

- 4 Year Undergraduate Degree
  - Enrollment in a program that satisfies the Certified Financial Planner (CFP) Certification Coursework Requirement is a plus
  - Candidates must be willing to pursue the CFP designation in their career
- High attention to detail
- Intuitive understanding and comfort with numbers and mathematics
- Desire to understand financial markets and the wealth management industry
- Drive and curiosity to build better systems to benefit the team and clients
- Adaptive and flexible, with the ability to handle multiple time sensitive requests while maintaining composure
- Resiliency, perseverance, and emotional intelligence
- Must sit for Series 65 exam within 90 days of hire
- Watchers of Ted Lasso are preferred - BELIEVE