Quadrant Capital Management, LLC

Title: Financial Planning Associate

Location: 100 Passaic Avenue, Suite 301, Fairfield, NJ 07004

Job Type: Full-Time (Entry-Level)

Compensation Type: Salary

Start Date: ASAP

Min. Education: Bachelor's Degree

Min. Experience: 0 - 1 Year

Job Description: As a Financial Planning Associate, you will work directly with a Senior Advisor developing comprehensive and integrated financial plans for the firm’s high net worth clients. You will be involved in all aspects of the financial plan, including insurance, investments, income tax, retirement, and estate planning. The ideal candidate is highly motivated, energetic and a team player.

Primary Responsibilities:

- Gather, analyze and organize client financial data
- Prepare comprehensive financial plans, reviews, reports and other analysis to evaluate the current financial position of a client using financial planning software, Excel and other financial applications
- Track communication and progress on tasks in CRM system
- Prepare Advisor in advance of client meetings and create meeting agenda
- Proactively communicate with Advisors regarding work in progress
- Maintain and update source documents from clients (statements, tax returns, wills, etc.), financial plan documents, etc. in an organized and consistent manner
- Assist Advisors with client communication, recaps, and recommendations
- Participate in weekly financial planning meetings

Qualifications:

- Excellent written and verbal communication skills
- Strong organization and time management skills
- Self-starter with an ability to prioritize tasks
- Team player, collaborative, able to work with others
- Dependable, detail-oriented, systematic and organized
- 0-3 years of working experience, or internship in similar industry
- Bachelor’s degree required (preferred in a financial field such as Finance, Financial Planning, Economics or Accounting)
- Demonstrated desire or progress towards CFP ® certification a plus

Application Instructions: Send Cover Letter and Resume via email to Jean McAllister at jmcallister@qcm.us.

No phone calls please.
**About the Organization:** Quadrant Capital Management, LLC is a fast growing personal financial planning and wealth management firm in the New York/New Jersey area.

We partner with affluent individuals and families to grow and preserve their assets. We listen to our clients with a goal of providing disciplined investment management and well-defined financial planning strategies that meet their unique needs. Our experienced professionals provide independent advice accompanied by the highest level of service. Our success is measured by the long term relationships we develop with clients and seeing them reach their goals.

*Benefits:* Competitive base salary, bonus, 401(k) & Profit Sharing Plan, health insurance and generous paid time off. Salary is commensurate with experience.

We are an Equal Opportunity Employer.