

Associate Financial Planner

Kreitler Associates, LLC is seeking an enthusiastic person to fill the position of Associate Financial Planner to assist in supporting financial planners. The position involves preparing client portfolio reports, gathering data, developing investment recommendations and researching client financial planning and investment issues.

Who we are:

Kreitler Associates is a premier, rapidly growing, independent firm. Our professionals offer fee-based, comprehensive wealth management to affluent individuals and families, including leading edge strategies in investment and retirement planning. We are located in downtown New Haven, CT. Securities are offered exclusively through Raymond James Financial Services, Inc., member FINRA/SPIC. Please see our website at www.kreitlerassociates.com

Overview of the Position:

- Provide high-level, personalized customer service
- Respond to all issues and keep financial advisor informed (responsible for details of 30-45 clients)
- Prepare financial review material for client meetings
- Attend client meetings, prepare notes and follow up on communications

Successful candidates should have the following qualifications:

- Ability to work with highly-educated, successful clients
- Strong work ethic, high level of integrity and ethical standards
- Excellent written and verbal communication skills
- High degree of expertise in Microsoft Office applications
- Professional individual who is client oriented
- Strong organization skills, ability to multi-task and meet deadlines, detail oriented, fast learner and flexible
- Desire and ability to work in an entrepreneurial team-based environment
- Bachelor's degree
- Series 7/Series 66 licenses desirable or expected to obtain within 6 months of employment
- CFP designation desirable or expected to obtain during course of employment
- 2-5 years experience in the financial planning industry

We offer a competitive salary and benefits. Advancement is possible.

Contact: Kim DiRaffaele

Kim.Diraffaele@raymondjames.com

195 Church St.

11th Floor

New Haven, CT 06510

203-867-4396 (phone)

203-867-4398 (fax)