The Plan Design & Analysis professional is a member of The Rawls Group's overall planning team and works under the direction of senior staff members. We seek an experienced Succession Planning Professional, CFP — Certified Financial Planner, CPA, and/or other Wealth Management Advisor to join the Plan Design & Analysis team and the processes to support the overall scalability of the succession planning practice. This full-time position provides technical support to Associates and requires employee to perform analysis of information received, review, and profile legal documents, generate initial modeling and scenarios, create, proofread, and edit client presentations, create charts and graphs, coordinate, and manage client expectations, and manage the ongoing support and needs of clients and Associates. Additionally, the Plan Design & Analysis professional is a client resource, to answer questions and concerns on behalf of the Associate. This individual works directly with company Associates and clients, is managed by the Director of Plan Design, and reports to the Director of Operations.

WHAT YOU WILL DO

As a highly valued member of the firm and financial planning team, you will lead the team to provide technical research and financial analysis to create effective and well-organized financial plans to support clients, company partners, and advisors in the succession planning process. In addition, you will conduct or participate in complex financial analysis and succession planning projects and provide direction and coaching to financial planning team members to achieve planning objectives.

WHAT YOU WILL BRING

Demonstrated experience in:

- Tax Planning
- Estate Planning
- Wealth and Investment Advisory
- Asset Protection

Solid understanding of:

- Trust governing documents
- Wealth transfer challenges
- Fiduciary issues
- Navigating regulatory frameworks

Possess these skills and attributes:

- Financial modeling
- Technical report writing
- Financial analysis
- Investment research and strategies
- Excellent communication skills, both written and verbal
- Strong organizational skills — evaluating and prioritizing tasks to meet deadlines

- Strong analytical/problem-solving skills
- Be a self-motivated team player
- Proficient in the use of Microsoft Office programs including Word, Excel, PowerPoint, and Outlook
- Experience with Salesforce CRM or similar CRM system preferred
- Leadership skills, along with the desire to lead, mentor, and coach team members
- Understanding, interpreting, and explaining legal documents

Education, Experience, and Certifications:

- 5 plus years' experience in financial planning, estate planning, or business succession planning, ideally with closely-held businesses
- Bachelor's degree in Finance, Accounting, or Business
- LL.M (Master of Laws) or J.D. (Juris Doctor) degree a plus
- One or more of the following certifications preferred: CFP, CPA, CFA

WHAT YOU WILL GET

The opportunity to join as a pivotal member of our team focused on business succession planning in capital-intensive complex businesses and family environments, driving impactful long-term value to business owners and perpetuate their legacies. You will have the opportunity to continue to hone your leadership and professional skills, obtain industry certifications, and work with professionals with vast backgrounds ranging from organizational psychology and family therapy to estate planning.

Generous base and variable compensation and benefits package including:

- Competitive base salary
- Incentive plan (paid monthly subject to achievement of Company established goals)
- PTO
- 401(k) retirement plan
- Medical, dental, vision, life, and disability insurance plans
- Professional development
- Career advancement

For more information, please email jobs@rawlsgroup.com.