Financial Planner

McLean Asset Management Corporation ("McLean") seeks an experienced Financial Planner to join our standalone financial planning practice area. This client-facing role supports the Managing Director of Financial Planning by participating in client meetings, building financial plans that reflect client goals, and participating in the plan presentation meeting with clients. This is a technical planning position with no business development requirements. While this is a salaried position and not a business development role, shared revenue incentives for sales are available for this position. This is a rare opportunity to work with a progressive, family-oriented firm with a flexible working environment.

Position Summary:
McLean is where theory meets practice. Known for its academic research on retirement income planning and implementation preferences, McLean applies best practices to create personalized plans for clients based on their unique styles and preferences. McLean's standalone plan engagement addresses an under-served need in the market for high-quality, comprehensive financial planning on a standalone basis, without the need to commit to an "assets under management" or "AUM" pricing model.

Responsibilities:
- Support the Managing Director of Financial Planning throughout the planning engagement (from discovery to post-meeting follow-ups)
  - Document the client's goals and objectives learned through a detailed discovery process to incorporate into the financial plan
  - Build financial plans using RightCapital and other software as needed
  - Identify implementation options aligned with the client's retirement income style and preferences to model within the plan
  - Prepare plan summary documents and recommendations, completing meeting notes, and add tasks to the CRM (Salesforce) as needed
  - Draft responses to client questions as they arise
- Coordinate with the planning team throughout the planning process to provide plan status updates

Requirements:
- CERTIFIED FINANCIAL PLANNER™ (CFP® designation)
- 2+ years of client-facing experience in a planning capacity
- Strong knowledge of financial planning concepts and processes
- Excellent written and verbal communication skills
- A self-starter mentality with effective time management skills
- Strong attention to detail

Preferences:
- Experience with RightCapital software
- Insurance licensed (fixed products only)
- Retirement Income Certified Professional® (RICP®) designation

Working at McLean
At McLean, team members work without micromanagement and are committed to a "client-first" mentality, consistently exhibiting independence, integrity, credibility, ethics, and professionalism. McLean fosters an environment of intellectual curiosity and believes in continuous learning and development. Our family-oriented firm prides itself on its warm, friendly culture and commitment to doing what is best for our clients and employees. Our employees have recognized McLean as one of the "Best Places to Work for Financial Advisors" and a "Best Places to Work in Virginia" in the small employer category. McLean Asset Management Corporation is an Equal Opportunity Employer. A comprehensive background check will be conducted on applicants for this position.