Financial Planning Associate

The Position:
We currently seek a Financial Planner with both analytical and relational skills to manage new and existing client relationships and perform financial planning tasks. We currently have a team/ensemble approach to financial planning, so all employees work with many of the same clients.

The primary skill we seek for this position is the ability to manage client relationships and develop financial plans. This includes a keen interest in relational skills, self development, and the analysis and application of financial data.

Responsibilities:
- Work with clients in both a coaching and technical financial planning role
- Demonstrate good social, communication and non-verbal listening skills
- Developing meeting agendas and generating financial plans
- Work collaboratively with team members
- Confidently deliver advice to clients via conference call or face-to-face meetings
- Structure advice and counseling around the big strategic financial picture
- Maintain high ethical standards, confidentiality and professionalism at all times

Qualifications:
- Energized by social interaction, is an exquisite listener
- Able to analyze technical data and devise sophisticated planning solutions
- Has an “owner’s attitude”
- Keeps agreements
- Does not view themselves as above doing any task or accountability
- Takes personal responsibility
- Has good time management skills
- Strong conceptual skills, able to see the big picture
- Has a high EQ and is passionate about personal development
- Able to meet deadlines, a Meyers Briggs “J”
- Eager to address their counter-transference issues around money
- Willing to obtain a degree in counseling or become an ICF Master Coach
- Has CFP®, CPA or JD.

Benefits:
- Incentive based gross revenue bonus program
- Career track available with opportunities for advancement
- 401K Plan and Profit Sharing Plan
- Paid holidays and vacation
- Unspecified PTO policy and open vacation policy
- Technology, Personal Development, and Fitness allowance
- Unlimited education cost sharing benefit
- Paid membership fees for industry associations

The Company:
We are a growing 34 year old, fee-only financial life planning company. We offer an unique "Holacratic" team-oriented culture, a reputation for excellence, established clients and growth potential to help you reach your personal and career goals.

Our employees are as important as our clients, and we work to provide both with a collaborative atmosphere and learning environment. We empower our employees through a unique governance structure (Holacracy) where each person has responsibility and control over decisions as they relate to the role they play within our company.

The core purpose of our company is to transform the financial and emotional well-being of people. This includes our clients and ourselves.

Our core values are authenticity, unbiased advocacy, well-being, and continuous improvement. We put our values into action by:

1. Putting clients first
2. Guiding people to reach a destination in an unfamiliar area
3. Giving sound advice and creative solutions
4. Constantly educating ourselves
5. Personally practicing what we preach
6. Taking clients only where we have gone ourselves
7. Being serial innovators
8. Taking personal responsibility for our actions and contributions

No phone calls please. If interested, please send resume and cover letter to rick@kahlerfinancial.com.

In your cover letter please tell us:

- We are curious about what attracts you to Kahler Financial Group.
- What does to transform the financial and emotional wellbeing of people mean?
- Tell us what will you bring to Kahler Financial Group.
- We are wondering about what you need most from Kahler Financial Group.
- What does "Financial planning from the inside out" mean to you in your life?
- Tell us what salary range do you expect to receive.
- We are curious about why you would want to live in Rapid City.

We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check and may be asked to complete personality and/or competency tests.

The City:
Pursuing a career in financial planning in Rapid City, South Dakota means you will enjoy the best of all worlds; great quality of life, low personal taxes, and a low cost of living.

Rapid City has an outstanding atmospheric and cultural climate, making it one of the best kept secrets in the US.

Nestled at the foot of the beautiful Black Hills, Rapid City is the perfect location for those who love the outdoors. It was rated the #3 top town for sportsmen by Outdoor Life magazine in 2011 and one of the top 25 cities to raise an outdoor kid by Backpacker Magazine. Rapid City is tied with Ft. Meyers, FL for having the best air quality of any city in the United States.

With summer and winter skiing, rock-climbing, hunting, fishing, boating, and more trails than a person could hike in their lifetime all within an hour's drive, Rapid City is the perfect location for those who love the outdoors.

Our residents enjoy the many tax and business advantages of doing business here. And when the cost of doing business is low, so is the cost of living. Consider that South Dakota has:

- **NO** Corporate Income Tax
- **NO** Personal Income Tax
- **NO** Personal Property Tax
- **NO** Inventory Tax
- Low cost of living, .81 of the national average
- The 2nd lowest state per capita taxes in the nation
- Fourth lowest overall crime rate in the nation
- An average commute time of 13.8 minutes
- Number one high school graduation rate in the nation

Rapid City features a steppe climate (Köppen *BSk*). Its location makes its climate unlike both the higher elevations of the Black Hills and the Great Plains to the east. It is characterized by long arid summers and mild, dry winters, with short but distinct spring and autumn seasons.