

Waiting List for: Administrative & Para Planning Positions

We are a growing 36-year-old, fee-only financial life planning company. We are a Deliberately Developmental Organization (DDO) that offers a unique team-oriented culture, a reputation for excellence, and an opportunity to achieve a fulfilling life/work balance.

Our employees are as important as our clients, and we work to provide both with a collaborative atmosphere and learning environment. We value our employees and we take pride in recognizing and supporting their outstanding talents and efforts. We empower all employees to have an ownership mentality where each person has responsibility and control over decisions as they relate to the role they play within our company. We commit ourselves to the delivery of a superior quality of services based on a foundation of honesty, integrity and ethical treatment.

The evolutionary purpose of our company is to facilitate the transformation of the lives of our clients and our associates.

Most importantly, the core values that bring us all together are *authenticity, 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

The Opportunities:

We are currently developing a waiting list for part-time or full-time administrative roles that may come available from time to time. A sampling of these roles include operations, client service, para-planning, IT/social media, bookkeeping, securities trading, and investment advising. We are looking for associates who are both qualified for the open position and especially passionate about working in our DDO culture.

Qualifications:

- Bachelor's Degree in Accounting, Business Management, Financial Planning, or IT, is preferred but will consider relevant experience in lieu of a degree
- We value related work experience
- Proficiency Microsoft Word, especially Excel and database applications
- Ability to self-organize
- Uses a personal management system. Our preferred system is GTD

- Ability to take the initiative to identify gaps in operational process and implement new innovative solutions that are relevant to the industry
- Excellent communication and people relationships skills, both in writing and person to person
- Ability to work through complex operational situations and identify solutions
- Drawn to a [Holacracy](#), a non-hierarchical organizational operating system
- Embraces Non-Violent Communication and other personal self-development practices

Benefits:

- Incentive based gross revenue bonus program
- Career track available with opportunities for advancement
- 401K Plan and Profit Sharing Plan
- Flexible work schedule
- Technology, Personal Development, and Fitness allowance
- Unique culture using Holacracy as a governance structure

No phone calls please. If interested, please send a PDF of your cover letter and resume to Careers@kahlerfinancial.com to be put on the waiting list.

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.