RADNOR
FINANCIAL ADVISORS

Job Posting: **Associate Planner**

About Radnor Financial Advisors, LLC

Radnor Financial Advisors, LLC is an independent, fee-only, wealth management firm in the Philadelphia area. For over 30 years, Radnor Financial Advisors, LLC has provided wealth management services to high net worth individuals and corporate executives. Our holistic approach integrates personal financial planning, tax considerations, estate concerns, and investment portfolio management.

At Radnor Financial Advisors, LLC, you can experience the benefits of personal wealth management. Our team of highly-qualified professionals provide comprehensive financial planning focused on the specific needs and circumstances of our clients – investment planning, estate planning, wealth transfer, retirement goals, tax planning, risk management (property and casualty insurance, life insurance, disability insurance) college planning, budgeting, benefits planning and more.

We believe the best financial advice is provided by people who are independent and objective. For that reason, we function as a fee-based advisory firm and take care to maintain exclusive advisor-client relationships. We do not sell investment or insurance products and we do not accept commissions. We consider that we have a duty to always act in good faith, and to place our clients' interests first and foremost.

Associate Planner

Radnor Financial Advisors, LLC is looking for an Associate Planner to be trained in our Financial Planning and Wealth Management Services to perform the following principal responsibilities:

- Support Consultants in managing client relationships.
- Prepare detailed financial statements, client reports, and client correspondence.
- Draft client communications.
- Assist clients with various inquires.
- Assist in quarterly report production and various projects.
- Assist in preparation of tax returns and/or tax projections.
- Manage the client on-boarding process; including opening new accounts, processing investment paperwork and interfacing with custodians.

Experience/Skills:

- Ability to work in fast paced environment and think clearly under pressure.
- Excellent teamwork, analytical, written and oral communication skills.
- Strong organizational skills. Detail-oriented.
- College degree. MBA, CFP or CPA a plus, but not required.
- Opportunity for long term relationship.

Compensation:
Compensation commensurate with requirements of the position plus attractive benefits.

To apply for the Financial Planner position, you must provide your cover letter, resume, and salary requirements to Ms. Vermillion at radnor@radnorfinancial.com for consideration.