Job Posting: **Financial Planning Resident**

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.

Financial Planning Resident

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

- Provide client support to Consultants/Planners.
- Prepare detailed financial statements, tax projections, client reports, and client correspondence.
- Assist in quarterly report production and various projects.
- Manage the client on-boarding process; including opening new accounts, processing investment paperwork and interfacing with custodians.
- Enter client information into various systems.

Experience/Skills:

- Completion of a financial planning degree at a CFP Board Registered Program a plus, but not required.
- Outstanding academic achievement and related work experience.
- Ability to work in fast paced environment and think clearly under pressure.
- Strong organization and time management skills. Detail-oriented.
- Excellent analytical, written and oral communication skills.
- Comfortable in a small office setting and have the desire to learn and grow.
- High personal standards with a team-oriented, fun-loving nature toward colleagues.

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.