
Junior Financial Planner

Company Description

Lake Street Advisors, LLC is an independent fee-only multi-family office located in Portsmouth, NH and Boston, MA serving clients in New England and across the country. We work intimately with ultra high net worth individuals and their families as their “Chief Financial and Investment Officer” to provide optimal, unbiased advice tailored to their situation.

Lake Street offers a professional, entrepreneurial and dynamic work environment with competitive employee salaries. Benefits include 401(k) with employer matching, health insurance with employer contributions, employer paid dental insurance, life insurance and short- and long-term disability.

Job Location

Portsmouth, NH or Boston, MA

Job Description

The Junior Financial Planner’s primary duties will include:

- Providing internal support to client teams by gathering various forms of data from multiple sources and preparing it for use in generating exhibits, producing quarterly reports and analyzing strategic options on the client’s behalf
- Assisting client teams on a wide variety of tasks to ensure the client’s requests are met in a timely manner, including money movement and account transitions
- Consistently and accurately maintaining client reporting during the off quarter months

Job Requirements

Though this position is considered entry-level, it requires strong analytical and math skills, keen attention to detail, and advanced proficiency in Microsoft Excel. The right candidate will be able to keep organized across multiple projects, prioritize work, communicate technical information effectively in a manner that is clear and easily understood, and keep colleagues apprised of progress. Having exposure to or interest in one or more financial planning disciplines such as income taxes, investments, insurance, and trusts and estates is preferred, coupled with a degree in mathematics, statistics, business, finance or economics.

Interested candidates should send their cover letter and resume to resumes@lakestreet.net

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