CFP® Candidate or Certificant/Financial Planning Assistant

Are you passionate about helping people? BLS Eldercare Financial Solutions has established a unique niche in Eldercare Financial Planning. We are known throughout the tri-state area as experts in helping families pay for long term care (e.g. assisted living, home care, nursing home). We call our firm “the affordable alternative to elder law attorneys”.

BLS is looking for a graduate of a CFP® education program who is seeking to enter the financial planning profession. We have an immediate opening in our Livingston, NJ office.

Your responsibilities will be to:
- Implement the plans we recommend to our clients
- Prepare financial projections using our Careculator™ tool
- Assist clients with completing trust questionnaires
- Communicate and coordinate with attorneys
- Proofread trusts and generate auxiliary documents
- Complete forms for deed changes
- Prepare claims for benefits
- Prepare written requests to transfer financial accounts
- Communicate with clients to obtain required data

This is a ground floor opportunity with a fast growing company. If you have strong analytical and problem solving skills, if you are able to absorb new information rapidly, if you are a self-starter who is a team player, we want to hear from you. Please email your resume to bsteinberg@blseldercare.com, along with a cover letter explaining why you qualify for this position.

To be a successful candidate you will need:
- Completion of a recognized CFP® education program
- Excellent command of written English
- Attention to detail and the ability to prioritize, organize, plan and effectively implement projects and tasks
- Ability to work independently and efficiently
- Client relationship management
- Excellent computer and data management skills
- Effective phone communications
- Excellent verbal and written presentation skills
- Ability to think on your feet and outside the box

Qualified candidates are those who:
- Have high standards and impeccable ethics
- Set and achieve high goals
- Work smart and hard
- Are technology savvy
- Are comfortable working with seniors and their families
- Obtain satisfaction from helping others

We plan to open additional offices in the future. This position can lead to a financial planning position in one of the new offices.