Reilly Financial Advisors (RFA) is seeking an entry-level Junior Financial Planner. The ideal candidate is pursuing a career in Personal Financial Planning with a passion for financial analysis & modeling and desire to improve financial literacy.

**Job Description:**
- Preparation, review, and update of comprehensive financial plans for an international clientele of 600+.
- Assist Senior Planner with client communication, agendas, recaps, and recommendations.
- Participate in client meetings in collaboration with Senior Advisor.
- Proactively communicate with Senior Advisors regarding work in progress and prospective pipeline.
- Maintain and update source documents from clients (statements, tax returns, Wills, etc.), case notes, financial plan documents (cash flow, net worth, retirement plan, action plan, etc.); in an organized and consistent manner.

**Job Requirements:**
- Minimum of a Bachelor’s Degree (graduation in Spring 2013 is ok) with a directly related Major.
- Interest in pursuing, or having obtained, the CERTIFIED FINANCIAL PLANNER™ designation.
- Clear ability to communicate verbally and in writing in an intelligent, courteous, and grammatically correct manner.
- Strong organization and time management skills with an analytical inclination.
- Self-starter with an ability to prioritize tasks.
- Team player, collaborative, able to work with others.
- Desire to work successfully in a small company (20 employee) environment.
- Previous experience in the Financial Planning Industry a plus.
- Knowledge of Money Guide Pro software a plus.

RFA is a well-established and growing Registered Investment Advisor with $490 million under management. We provide a comprehensive suite of wealth management services to clients across the United States and around the world from our headquarters in San Diego, California.

The position is a full time salary + benefit position. Pay is commensurate with experience, education and qualifications.