

September 10, 2019

Financial Planner-Lakeland

CPS Investment Advisors is a fee-only, fiduciary investment advisory firm located in Lakeland, FL. CPS is looking for a Financial Planner to join a team that manages over a billion dollars of client assets. You will spend your time working with individuals, families, or small businesses in order to develop customized financial plans based on the unique financial situation of any client. These plans are living and continuously evolving documents that reflect a client's passions, goals, and ambitions.

Financial Planners within CPS are given high levels of responsibility. Planners develop their prospect pipeline, continuously engage the families they touch, and give back to the local community. Planners work closely with the CPS Trading Department to manage portfolios within the context of the firm Investment Philosophy and collaborate with other planners as needed. CPS supports Financial Planners by offering extensive training opportunities to continue their education, further their careers, and serve their clients financial lives.

The ideal candidate for this position has a passion for helping others achieve their goals. The candidate would be able to think critically and be comfortable making recommendations independently in ambiguous situations. Successful candidates are comfortable speaking publicly, meeting new people, and are active listeners. Finally, the candidate would be driven to continually learn and educate themselves as the industry evolves.

Duties & Responsibilities

- Develop a thorough understanding of their client's needs, wants, and ambitions in order to help them achieve their goals.
- Provide fiduciary financial planning recommendations to clients and prospects.
- Continually engage and support clients as needed.
- Develop and maintain relationships that drive business growth.

Education and Skill Requirements

- Bachelor's Degree in Accounting, Finance, Economics, or Business Administration. Other degrees will be considered on a case-by-case basis.
- Series 65 license (ability to obtain one).
- CPA license or CFP® certificate holders preferred, or the ability and willingness to obtain one.
- Demonstrated ability speaking and engaging individuals publicly.
- Comfortable soliciting and developing new relationships.

Interested applicants can send their résumé and contact information to Michael Scott at trading@cpsinvest.com.

CPS Investment Advisors is a full-service, independent financial advisory firm located in Lakeland, Florida. CPS provides holistic financial planning and investment advice to its clients for them to achieve the ultimate financial freedom: the ability to choose between wanting to work and being required to work.

CPSInvest.com