Diversified Trust
Comprehensive Wealth Management

FIRM SUMMARY

Diversified Trust is a long standing employee-owned comprehensive wealth management firm based in the Southeast with over $5.5 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments, and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Greensboro, Memphis, and Nashville.

POSITION
Senior Financial Planner

OFFICE
Atlanta

SUMMARY
DTC is a growing company, looking to add to our Atlanta team. We are seeking highly motivated, service-oriented, entrepreneurial-minded financial planning professionals.

CONTACT
Jessica Stembridge
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FOR MORE INFO ON DTC
diversifiedtrust.com
Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:
This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

As a Senior Financial Planner, a typical day might include the following:

- Create comprehensive financial plans addressing estate planning, retirement planning, tax planning, insurance, investments, and other client related financial questions
- Participate in client meetings and explain complex financial planning topics
- Handle and respond to inquiries and interact with clients related to their financial plans
- Coordinate services and information exchanges with clients' other advisors such as CPAs, attorneys, or insurance agents
- Participate on a firm wide financial planning team to establish best practices
- Be a resource for financial planning knowledge and expertise
- Identify and develop trusted relationships with prospective clients

This job might be for you if:

- You are a true fiduciary - you always act in the client's best interest
- You excercise sound judgement - you are able to manage risk effectively
- You are a team player - you have strong interpersonal skills
- You are motivated and driven - you are interested in advancing to more senior client management positions; you have a strong work ethic; you possess an ownership mentality
- You communicate clearly - you are well-written; you speak articulately; you are comfortable communicating in person, in writing and on the phone
- You take confidentiality seriously - you maintain strict confidentiality of client and company information
- You enjoy solving problems - if you don't know the answer, you dig until you find it; you enjoy finding creative solutions to problems; you are known for your analytical skills and linear thought

To get this job you should have:

- A strong academic background with a Bachelor's degree or above
- At least 5 years of experience in the wealth / investment management or finance fields
- A strong proficiency in Excel and PowerPoint

We are giving additional consideration to those with:

- Professional designations such as CFP®, CFA, CPA, CTFA
- Advanced degrees in finance, business administration, accounting or law
- Experience with eMoney or other comparable financial planning tools
- Experience with Black Diamond performance reporting tools

If this job seems like a good fit, please email your resume and cover letter to Jessica Stembridge.