

Position: Financial Planning Analyst

Company: The Commerce Trust Company, a division of Commerce Bank

- *The position will be located in our downtown Kansas City office.*

Education & Experience Requirement:

- Bachelor's degree
- Advanced skills in Microsoft Excel
- 2yr work experience in financial/banking industry

Preferred Experience:

- Experience working in personal wealth management and planning environment, or accounting background.
- Completion of CFP® education or CFP® certification
- Experience using financial planning software, such as MoneyGuide Pro, MoneyGuard, eMoney, Naviplan, SSAnalyzer, etc.

Job Duties & Responsibilities:

- Support the development and delivery of personal financial plans.
- Analyze and interpret complex personal financial information.
- Interact with planning software and verify accuracy of the work product.
- Communicate internally with trust personnel, relationship teams, and externally with high net worth clients and prospects.
- Proactively research financial planning topics to stay up-to-date with key industry changes.

Required Skills:

- Highly oriented to attention to detail and operates with the highest level of accuracy.
- Analytical, problem solving & decision-making skills.
- Ability to manage complexity with strong time management & organizational skills.
- Resourceful & initiative taker.
- Proficiency in TVM and loan calculations.

Opportunity to....

- develop your planning skills significantly and grow towards becoming a financial planner.
- work alongside experts in investment management, estate planning & business development, in addition to the senior planners.
- dedicate 100% of your time to planning analysis, while being involved in team projects.

To apply or for more details about the position, visit:

https://commercebank.wd1.myworkdayjobs.com/CommerceJobs/job/MO---Kansas-City-DowntownPlaza---Kansas-City---KC-Downtown-Bank-Building-1000-Walnut-64106/Financial-Planning-Analyst_23959