



**Title:** Financial Planning Associate/Client Services

**Location:** Leawood, KS

**Job Description:** The Financial Planning Associate will assist our Financial Advisors with the preparation, implementation and monitoring of client financial plans. This individual will also provide support to our Compliance Officer and handle client service related tasks.

#### **Job Duties**

- **Para-planning:** assisting our 2 CFPs in planning prep, data-entry, proactive updating/scheduling and client interaction on all planning-related topics.
- **Compliance assistance:** working with our CCO on various tasks to reinforce best practices and policies/procedures critical to retaining the compliance integrity of the company.
- **Admin assistance:** as a small firm we all wear many hats and this position would involve trade-ticket reconciliation, data archiving and general administrative and organizational duties.

#### **Required Experience**

- Bachelor's Degree;
- MS Office proficiency;
- Must be organized, detail-oriented and able to multitask;
- Desire and ability to work successfully in a small company environment.

#### **Salary & Benefits**

- Salary is competitive based on industry standard;
- 2 weeks paid vacation & sick days for the 1<sup>st</sup> year, 3 weeks paid vacation & sick days after 1<sup>st</sup> full year of employment;
- Paid market holidays (Martin Luther King, Jr. Day, President's Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas);
- Option to participate in our 401(k) plan/ 401(k) company match of 5%;
- Group Life Insurance policy offered;
- Health, vision and dental insurance offered through United Healthcare at an employee rate of 25% of premium (KCP will pay 75% of health premium).

Please email resume and cover letter to Stefanie Callahan at [stefanie@kavarcapital.com](mailto:stefanie@kavarcapital.com).