



Stepp & Rothwell

Financial Planning Associate

About Stepp & Rothwell:

Stepp & Rothwell is the premier “fee-only” financial planning and investment advisory firm in the Kansas City area.

Our team of financial professionals provides unbiased, results-oriented advice, which offers our clients the knowledge they need to make informed decisions about their future. Because we believe issues like financial independence, estate planning, tax planning, cash flow management, risk management, education planning, and wealth accumulation and preservation are completely interrelated, we develop client-specific strategies that encompass them all. Stepp & Rothwell is not just a money-management firm – we are focused on our clients, their happiness, and their enjoyment of life.

Our hiring process is rigorous, we hold our candidates to the same standards that we hold ourselves. Only upon satisfactory completion of our internal aptitude testing and interviewing process will you be considered for any position at Stepp & Rothwell.

Associate Description:

This entry-level position is a key support role for a team of financial planners in an established and growing fee-only financial planning firm. The Financial Planning Associate is an integral member of our financial planning team. Using your logic and analytical skills, you will effectively evaluate a broad range of data and information to prepare financial reports and projections that will help our Financial Planners give the very best, unbiased recommendations to our clients. You will then use your superior customer service and communication skills to help our clients work with associated professionals to implement those recommendations. This position offers a unique opportunity for an intelligent and detail-oriented individual to learn all aspects of financial planning.

To apply, please submit a resume, cover letter and transcript to:

Amy Guerich
Recruiting Manager
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steppandrothwell.com