



## *Millennium Advisory Services, Inc.*

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5340 Twin Hickory Road, Glen Allen, Virginia 23059  
Office: (804) 346-1040 Toll Free: (877) 435-2489 Fax: (804)346-1044

Millennium Advisory Services is looking for a detail-oriented and hardworking individual to join our firm as a **Financial Planning Associate**. The Financial Planning Associate is an integral part of the Client Services Team. They will create financial plans that will ultimately be delivered to our clients and provide professional communication with clients via phone, written correspondence, as well as in-person. Future opportunities to advance within the Client Services Team or to an Advisor role and throughout Millennium may exist.

### **Job Responsibilities**

#### **Responsibilities of this position include, but are not limited to:**

- Develop financial plans based on advisor notes from new client meetings
- Continuously monitor the financial plans for existing client relationships of the firm
- Support the firm's financial advisors with providing proposed and essential financial planning changes for the client
- Maintain consistency and accuracy across the financial planning department
- Oversee and amend company assumptions for financial planning
- Be proactive on the needs and problem solve for advisors and peers
- Coordinate with other teams to be sure that all aspects of the clients' accounts, financial plan, and investment portfolio are managed effectively
- Communicate professionally with clients via phone, written correspondence, or in-person for financial plan updates, account maintenance requests, and other functions as needed

### **Job Qualifications**

- 1-3 years of experience in the financial planning profession preferred
- Bachelor's degree
- Candidate for the CFP® exam or willingness to meet the requirements to sit for the exam
- Currently holds Series 65 or ability to pass necessary securities license exam(s)
- Experience with goals-based planning software and client relationship management software preferred
- Capacity to oversee other individuals to produce consistent, accurate results
- Ability to handle multiple priorities with consistency and a strong attention to detail
- Passion for helping others achieve their financial goals
- Ability to think critically and problem solve in a rapidly changing environment

Millennium Advisory Services is a fast-growing, fee-only financial planning firm located in Richmond, Virginia. Our goal is to provide investment management services and financial planning advice that makes a meaningful difference in the lives of our clients. We offer our services to individuals as well as employees of higher education institutions across multiple states with a rapidly expanding client base.

Millennium offers a competitive salary and benefits package. We foster a team-oriented, friendly environment for our employees, which provides a firm foundation on which to build lifelong relationships with our clients. We are seeking professional, passionate, and client-focused members to join our team.

Please send a cover letter and your resume to Jordan Smith via email at [jsmith@mcmva.com](mailto:jsmith@mcmva.com)

**EOE M/F/V/SO**

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