



Experienced or Entry-Level Financial Planner

Pacific Capital Resource Group, Inc. is one of the fastest growing financial services firms in the Northwest, currently directing the financial lives and managing the assets of thousands of individuals and businesses in the Puget Sound region. We are seeking high caliber individuals who will succeed in a fast paced, dynamic environment. Our market is comprised of high income tax bracket individuals and business owners, where our expertise in tax planning and tax sensitive investing provides added value. We provide superior support and compensation for entry-level and experienced Financial Planners.

Job Description

To assist up-scale and emerging up-scale individuals meet their long-term financial goals such as retirement, college tuition, and estate planning, with heavy emphasis on tax reduction. Once a comprehensive financial plan is developed, to assist the client in all phases of implementation. Also, design and implementation of 401(k) and other retirement plans, with special emphasis on Selective Benefit Plans for highly compensated employees and owners. Training program leads to Certified Financial Planner and/or Chartered Financial Consultant designation(s). Salary plus commission plus bonuses. Full benefits.

Job Requirements

- Bachelors degree or higher; financial services, finance, economics, business administration, accounting or Law preferred.
- Track record of success in academic and/or career endeavors.
- Can handle long hours and rigorous training.
- Impeccable character: All applicants will be subject to extremely thorough background checks, including criminal and credit checks.

Applicants must have lived in the greater Puget Sound area for three years or more.

Contact Information:

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Director of Recruiting

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