



## Wealth Management

Mark A. Kuhn  
mark@kuhnadvisors.com

Scott W. Ranby  
scott@kuhnadvisors.com

### **Wealth Analyst**

#### **Position Description**

We seek an aspiring Certified Financial Planner® professional who can support our wealth management team with investment research, financial planning, operations, and client service activities. We create customized wealth management plans for clients that incorporate planning around their goals for retirement, education, estate and philanthropic wishes, and tax optimization. In this position, you will learn how we view the investment world, our approach to building diversified, long-term portfolios, and why we've chosen particular fund managers to fill out each client's portfolio. The position will work closely with the firm's advisors and operations staff to gain broad exposure to the operations of a Registered Investment Advisor.

#### **Duties and Responsibilities**

- Create retirement and education planning analyses using eMoney
- Develop portfolio and planning recommendations consistent with client goals
- Prepare materials for client meetings
- Attend client meetings and coordinate action items with operations staff
- Generate trades related to client cash needs, RMDs, and charitable gifts
- Orient yourself to the firm's investment philosophy
- Coordinate and attend update meetings with fund managers
- Track investment performance of manager lineup and provide insight into performance drivers
- Attend investment conferences and mutual fund due diligence events throughout the year. This involves approximately 15-20 days of travel annually.
- Pass the CFP and Series 65 exams within one year of the hire date

#### **Required Skills and Education**

- Attainment of a bachelor's degree from an accredited institution
- Detail oriented
- Client service focused
- Excellent written and verbal communication skills
- Comfortable learning new technologies

- Maintain confidentiality of client information

## **Hiring Requirements**

- Consent to background and credit check
- Proof of COVID-19 vaccination

## **Position Benefits**

### **Retirement Plan and Profit Sharing**

You are eligible to defer a portion of your salary, up to IRS limits, into the firm's 401(k) retirement plan. Kuhn Advisors will contribute 3% of your salary to the 401(k) plan provided you contribute at least 1 %. Depending on the firm's financial results, the firm may also contribute a portion of profits to each employee's retirement account.

### **Vacation**

New employees are eligible for 10 days of vacation annually. After two years of employment, vacation days increase to 15 days annually and after four years increase to 20 days annually.

In addition to vacation, the firm provides the following paid holidays:

- New Years Day
- Martin Luther King Day
- Presidents Day
- Good Friday
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Thanksgiving and the Friday following
- The week between Christmas & New Years

### **Paid Parental Leave**

After completing one year of employment, you are eligible for up to 12 weeks of paid leave following the birth or adoption of a child. For employees with less than one year of service, a pro-rated benefit equal to one week of paid leave for each week of service is available.

### **Healthcare Reimbursement Plan**

After 90 days of employment, you are eligible to participate in our healthcare reimbursement plan. Kuhn Advisors will reimburse eligible healthcare expenses up to \$5,850 annually. (\$487.50 per month)

### **Short-Term Disability Benefit**

Employees experiencing a short-term disability are eligible for up to 12 weeks of fully-paid leave and an additional 12 weeks at 67% pay.

### **Caregivers Leave**

10 days paid leave annually to fulfill duties as a primary caregiver after one year of service.

***Kuhn Advisors, Inc. is an Equal Opportunity Employer***