



## **Job Title: Financial Planner**

### **About Westmount**

Since we established Westmount in 1990, our vision has been clear. Be an incubator for innovative thinking, whether that's being one of the earliest firms to adopt a business model that puts clients' interests first, embracing alternative investments like real estate and private debt, or providing leading-edge financial planning. There's something else: our people. Westmount strives to be a magnet for the top talent in wealth management by providing thoughtful mentoring, a supportive environment for growth and the freedom to pursue fresh new ideas on behalf of our clients. That mindset has allowed us to assemble one of the sharpest, most dynamic advisory teams in LA.

### **Responsibilities**

1. Work with Director of Financial Planning and Advisors to deliver comprehensive financial planning to clients and prospects
  - Assist in gathering data, organizing client information
  - Construct financial plans by entering data into eMoney
  - Updating existing financial plans
  - Deliver financial plans to clients/participate in meetings
2. Research miscellaneous financial planning questions/topics
3. Undertake special projects (e.g., plan tracking, department metric analysis, etc.) as needed.

### **Requirements**

- 2-5 years of experience in comprehensive financial planning
- Experience with eMoney preferred
- Bachelor's degree (prefer accounting, finance or related field)
- CFP designation preferred (or expected to obtain within 2 years of hire)
- Client-facing experience with high-net-worth clients
- Strong organizational skills including the ability to handle multiple tasks and shifting priorities
- Demonstrated strong presentation, analytical skills and attention to detail

Interested candidates should send their resume to [careers@westmount.com](mailto:careers@westmount.com).