

# United States Jobs Expertini®

## Senior Financial Planner

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Company: Ridgeline Financial Partners

Location: United States

Category: other-general

**Company Description**Ridgeline Financial Partners is a financial planning firm located in Greater Hartford. We pride ourselves on becoming our client's most trusted advisors. Ridgeline Financial Partners is one of the country's fastest growing firms and we are looking to add a seasoned member to our team with a strong work ethic and commitment to acting in the best interests of the client.  
**Role Description**This is a full-time on-site role for a Senior Financial Planner at Ridgeline Financial Partners located in Greater Hartford. As a Senior Financial Planner, you will be responsible for providing comprehensive financial planning and investment management services to clients. You will collaborate with clients to develop personalized financial plans, analyze their financial goals, and provide strategic recommendations to help them achieve their financial objectives. You will also monitor and review client portfolios, stay updated on financial market trends, and ensure compliance with regulatory requirements.  
**Qualifications**Minimum of 3 years of experience in financial planning or related roles  
Certified Financial Planner (CFP) designation or intention to pursue the designation  
Strong knowledge of investments, retirement planning, tax strategies, insurance, and estate planning  
Excellent communication and interpersonal skills  
Ability to build and maintain client relationships  
Demonstrated proficiency in financial planning software and tools  
Bachelor's degree in finance, business, or related field  
Series 7 and 66 (or 63 and 65) licenses  
Attention to detail and strong analytical skills

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