APELLA
Advice for Life

Financial Planning Resident Job Description

About the Firm

Apella Wealth is a fee-only comprehensive financial planning firm headquartered in Glastonbury, CT with offices nationwide. In our Huntington Beach, CA office, we focus on championing women and families, particularly as they navigate financial complexities that come with major life changes. We are tireless advocates for those we serve through all transitional stages including the loss of a spouse or loved one, divorce, career change, sale of a business, or an upcoming retirement. For some, we act as an educator. For others, a coach or mentor. For most, we are an important catalyst and trusted partner that inspires clients to take control of their financial lives.

Joining Apella Wealth means joining a culture built on community, volunteerism, lifelong learning, and an unwavering commitment to doing the right thing for our clients, colleagues, and each other.

About the Position

The Financial Planning Resident position is a unique opportunity structured to fast track your career in the fee-only, full-service financial planning community. You will apply the academic knowledge you have acquired from your studies at a CFP Board-registered program through vital real-world projects involving investments, estate, tax, retirement, and insurance planning along with developing close relationships as you help clients achieve their goals. This experience will position you to pass the CFP® exam, earn your designation, and thrive as a financial planning practitioner. You will be supported by a team of experienced CFP® professionals on every step of your journey. FPA membership, attendance at conferences, and other internal and external training opportunities are all part of your superlative Financial Planning Resident experience.

The Financial Planning Resident position lasts approximately three years. Upon completion of the program, an outstanding candidate will be qualified to continue in a leadership capacity within Apella Wealth or, as a "graduating" Resident, you will have the full support of our team as you vet and select your next opportunity outside the firm.

Must Haves

- Unwavering dedication to ethics and professionalism
- Hold a bachelor's degree and have completed a CFP Board-Registered Program (or be near completion)
- Enthusiastic commitment to the financial planning profession and its community
- Demonstrate an ability to verbalize and write with confidence and clarity
- Excel in working with team members and working individually
- Willingness to relocate to Huntington Beach, CA – the Resident position is not a remote position
- Hunger to learn and strive for growth

Job Duties

- Support Senior Financial Planners in all facets of the client relationship including timely execution of planning projects and ownership of meeting preparation and follow-up action items
- Aid in the creation and implementation of advance planning strategies in the areas of tax, estate, risk management, college, retirement, and investments
- Craft investment plans, develop implementation strategies, and participate in the ongoing trading and monitoring of portfolios
- Participate in the discovery meeting and onboarding process for new clients
- Communicate regularly with clients via phone, email, and in-person
- Support the Client Services team in the execution of operational-related tasks
- Participate in short and long-term success of the firm through weekly team meetings, quarterly strategic planning meetings and study groups
- Write content for the blog digest and other related publications

Compensation and Benefits

- Competitive starting salary of $65,000 plus opportunities for discretionary performance-based bonus
- 401(k) with company match
- Short and long-term disability coverage
- Life insurance benefits
- Company-provided health insurance
- Allotted time during work hours to study for the CFP® exam
- CFP® exam review courses and registration fees are covered
- FPA membership
- Team fun and retreats

How to Apply

Please send your resume, cover letter, short essay answers, and link to your short video introduction to resident@apellawealth.com. Applications will be accepted through **Friday, October 13th.**

Short-Essay Questions (please no more than 500 words per question):

1. Why do you want to work for Apella Wealth? And/or why do you want to work with women in life transition?
2. What would you bring to Apella Wealth that is unique and special?
3. What would you need from us to reach your highest potential?

Short Video Introduction (use any recording format you'd like such as Zoom, Microsoft Teams, or Loom; limit video to no more than three minutes):

1. Tell us about yourself.
2. What is the most interesting thing you know about Huntington Beach, CA?