



Planning Associate

Reports to: Senior Advisor
Location: Bala Cynwyd
Benefits: Yes
Status: Full-time, exempt

About Us: Odyssey Capital Advisors (OCA) is a growing independent registered investment advisory firm located in Bala Cynwyd, Pennsylvania. Trust and transparency are at the heart of who we are and what we do as we help our clients reach their professional and financial goals.

About the Role: Odyssey Capital Advisors is seeking a Planning Associate. This individual will have regular contact with clients, assisting advisors in preparing presentations and analyses of financial positions for clients. They will also work on routine projects between meetings and will undertake follow through responsibilities on task assigned. The Planning Associate will utilize financial planning software and investment management software while learning about the various fundamentals of wealth management. Our clients trust us and refer us to their family and friends because we place honesty and integrity above all else and strive to do what's best for them. The ideal candidate enjoys forming long-lasting relationships with a varied group of clients. In this position you act as a trusted financial expert to our clients and employees who stays abreast of industry and regulatory updates, the economy and financial markets, and fraud and cybersecurity threats.

The impact you can make:

- Prepare for client meetings by reviewing data and ensuring accuracy
 - Collaborating with our financial planners to develop holistic customized plans for clients
 - Consult with Investment Analyst in preparing investment recommendations for clients
 - Coordinate financial planning data for financial planning clients
 - Prepare and analyze information and develop reports in preparation for client presentations
 - Provide the firm with Operational support, including but not limited to understanding firm policies, procedures and digital tools
 - Assist with the coordination of marketing events
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What excites you:

- Delivering service beyond client expectations
 - Active listening and connecting easily with people to build trusted, lasting relationships
 - A fiduciary mentality: always doing what's right for the client and maintaining confidentiality in all matters
 - Using advanced analytical and quantitative skills, with demonstrated sound judgment in working with clients
 - Taking initiative and generating a quick turnaround
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What you bring to OCA:

- High emotional intelligence and/or life experience to help clients accomplish their goals through all life stages
- Bachelor's degree in Business, Finance, or Financial Planning or related field



- 1-3 years of financial services operational or relationship management experience
 - Strong desire to obtain or retain CERTIFIED FINANCIAL PLANNER® designation
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What OCA brings to you:

- Salary Range: 60-65k per year
- Benefits include but are not limited to: health care; vision, 401(k) plan with firm match, PTO, professional development support
- Culture of recognition where employees acknowledge and reward great work of their colleagues

Odyssey Capital Advisors is committed to building a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regards to color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.