NEXT PHASE
ADVISORY GROUP
NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

Job Posting: Financial Planning Analyst for Next Phase Advisory Group

POSITION: Financial Planning Analyst

OVERALL FUNCTION

- This position has responsibility for the creation and updates of PX documents, planning tools and other documents needed for service advisors. This position will also help with other tasks associated with preparation and follow-up for client/service advisor meetings.

DUTIES & RESPONSBILITES

- Exceed client expectations by working to provide accurate, detailed, and comprehensive information to service advisors and other team members.
- Prepare client reports for meetings.
- Maintain Client Files
- Translate raw data and information into professional reports and documents.
- Support the development of comprehensive financial plans for clients using our proprietary software.
- Review household records for discrepancies or items requiring attention.
- Organize both current and archival reports and other client meetings documents.
- Update meeting agendas & relevant talking points.
- Work alongside advisor for any other case preparation needed.
- Stay informed and up to date on financial planning subjects like IRS contribution limits, govt regulations, etc.
- Take on new work or projects to learn, grow and expand areas of expertise.
- Make proactive recommendations to improve process or deliverables to clients.
- Present a positive and professional image of Next Phase Advisory Group

SKILLS/QUALIFICATIONS

Required

- 1-3 years of experience working in an office/professional work environment
- Strong critical thinking, organization, and time management skills
- Comfort and confidence in learning new software.
- Keen eye for detail and data analysis
- Timely follow up and sense of priority
- Strong analytical, problem solving, written and verbal communication skills.
- Strong attention to detail, accuracy, and reliability
- Ability to adapt to change and thrive in a fast-paced environment.
- Familiarity with Microsoft applications and data entry and information retrieval software
- Excellent oral and written communication skills
- Serve as a high functioning member of a team, able to work well in a team environment.
- Ability to work independently.
- Ability to take initiative and ask probing questions.
- Ability to maintain confidentiality.
- Ability to manage multiple diverse projects and assignments in a prompt and high-quality manner.

Preferred

- Previous experience working in finance or related field highly desired, but not required.
- Ability to assess financial situations and analyze portfolios.
- Willingness to obtain certifications and continue professional development:
  - Life and Heath license preferred or willingness to obtain.
  - Series 6 and/or series 7 license or willingness to obtain.

COMPENSATION AND BENEFITS

- Salary Range: competitive based role and location
- Other benefits
  - Medical, dental, and vision coverage
  - 401K
  - Life Insurance
  - Short/long term disability
  - Paid Time Off & Paid Sick Time
  - Flexible scheduling/work from home
  - Continuing education
  - Work perks such as lunches, team outings, etc.

WORKING CONDITIONS

- Work will take place in a traditional office setting.
- Most time will be spent working at a desk.
- There is no fully remote option for this position - must be in office a minimum of 3 days/week.

COMPANY OVERVIEW

Next Phase Advisory Group is a Private Client Group firm within Northwestern Mutual, with access to resources befitting high-wealth clients. Next Phase Advisory Group works as a trusted guide, clarifying financial goals and helping to navigate life's transitions. The firm supplies big-picture thinking that goes well beyond the investment portfolio.

NPAG's comprehensive approach aligns life plans with financial plans, putting together a strategic balance of retirement planning, insurance solutions, intergenerational planning, wealth management, and more. The team helps clients to define financial goals and plot a decisive course of action with a unique focus on the importance of maintaining strong client relationships.

When working with our team, your life journey only gets better.

APPLICATION PROCESS

- Position will remain open until filled.
- Screening process will include on-site interviews and assessments.
- Background check/finger printing process required before hire

Please send resume and cover letter to Michael Lushniak, Director of People, via email at Michael.lushniak@nm.com