**Name**: Staff Financial Advisor
**Position**: Immediate
**Description**: Summit Financial Strategies, Inc. in Columbus, Ohio, is a Fee-Only wealth management firm serving 500 clients and their families. Summit is seeking a CFP® licensee (or individual currently working towards CFP® certification) with 2 or more years of experience in the Financial Services industry to join our growing team.

Please visit www.summitfin.com to learn more about our firm.

Job Responsibilities:
- Review and interpretation of financial reports and documents
- Preparation of materials for client meetings
- Produce tax, cash flow, and retirement projections
- Implementation of recommendations on clients' behalf
- Respond to client inquiries and complete follow-up activities as necessary

Skill Requirements:
- Must be a CFP® licensee or currently working towards CFP® certification
- Bachelor's degree in Financial Planning, Accounting, Finance, or related field
- 2 or more years of experience in the Financial Services industry (Financial Planning, Accounting or Finance)
- Strong computer skills – experienced and proficient in Excel and Word
- Experience with software in the areas of portfolio management, client relationship management, investment research, and portfolio rebalancing software a plus
- Ability to work well in a team environment
- Willingness to learn
- Attention to detail
- Excellent verbal and written communication skills

Summit's Mission Statement:
- To provide the highest quality of objective, professional financial advice to our clients and their families to help them identify and reach their personal goals.
- To add expertise and practice capabilities by assisting our associates with improving their skills and knowledge in financial matters.
- To maintain a positive, challenging, and enjoyable work environment that is rewarding for our associates.

Contact:
Interested candidates should submit a cover letter, resume, and salary requirements to sfsresumes@summitfin.com or fax to 614-885-1495. No phone calls please.