FINANCIAL PLANNING JOBS:

RESUME TIPS

As you prepare to apply for your next financial planning position, make sure you review your resume and update it with the following advice from current industry professionals.

1 LENGTH:

Keep it concise, no matter how much experience you have. 1-2 pages is the ideal length.

2 SKILLS AND CERTIFICATIONS:

Begin your resume with a bulleted list of key skills and any relevant certifications. This gives the hiring manager an instant snapshot of your qualifications.

3 HIGHLIGHT RESULTS:

If you're new to financial planning: Instead of listing responsibilities, showcase how you've added value in previous roles. Emphasize successes you've achieved with transferable skills like financial analysis, client relationship management and data analysis, as well as soft skills like communication and problem solving. You can also highlight your ability to use common technology tools such as Excel, Tableau, and PowerPoint.

If you're experienced in financial planning: Highlight how you've made a difference: share client success stories, innovative solutions, growth in your book of business and ways you've brought clarity to complex financial situations. Focus on your expertise in areas like investment management, financial modeling and client portfolio management.

4 LANGUAGE:

Use action phrases like "created personalized strategies," "streamlined financial processes" or "empowered clients to achieve financial goals."

5 REVIEW:

Platforms like Teal or TopResume are great for polish, but also ask someone in the financial planning profession to review for industry relevance.

WHEN YOU UPLOAD YOUR RESUME TO THE CFP BOARD CAREER CENTER, you can get a free resume review from TopResume – plus put your profile and resume in front of major financial planning firms.

CFP BOARD

READY TO PUT YOUR RESUME TO WORK?

Visit the CFP Board Career Center at **CFP.net/careers** to find job listings and start applying!