

JOBS IN FINANCIAL PLANNING

TO GROW 15% OVER THE NEXT DECADE*

*According to U.S. Labor Department

THINGS TO CONSIDER FOR FINANCE JOBS



Type of work and roles: See overview provided here.



Salary structure: Base salary, commission, or combination?



Position: Client-facing, or behind the scenes?



Professional Development: Many organizations support employees working towards CFP® certification. Just ask!



83,000+

NUMBER OF CFP® PROFESSIONALS IN THE U.S.



2K+

NUMBER OF EMPLOYERS WHO HAVE LISTED JOBS



80

AVERAGE NEW JOBS POSTED MONTHLY



85%

USERS WHO WOULD RECOMMEND SITE TO OTHER JOB SEEKERS

BROWSE AVAILABLE POSITIONS AT TOP FIRMS

✓ EXPERIENCED ✓ ENTRY LEVEL ✓ INTERNSHIP



NATIONWIDE
DATABASE OF JOBS

The CFP Board Career Center is an online resource that lists current job and internship opportunities in the financial planning field. The Career Center is FREE to job seekers. Log in today to create your profile and upload your resume to find the next step on your career path.

FINANCIAL ADVISOR RANKED #9 IN BEST BUSINESS JOBS

BY U.S. NEWS AND WORLD REPORT 2019

It's a great time to consider a career in personal financial planning. More people are seeking professional advice as they plan their financial futures. With this demand, the career opportunities for financial advisors are growing as well.

A personal financial advisor is someone who establishes a one-one-one relationship with their clients and provides ongoing comprehensive and holistic advice to guide them in all aspects of their finances and help them achieve their financial goals including educating their children, investing for future goals, and saving for a secure retirement.

Personal financial planning is a field for those who want to help people. Along with financial expertise, working in the field requires a range of attributes including good relationship-building skills, as well as the ability to listen to clients and to ask the right questions in order to develop a strong financial plan that encompasses all needs. There are also behind-the-scenes positions involving operations, research, and analysis. Some of the roles and job titles you'll see in the field include:

Financial Planner
Financial Advisor
Wealth Management Advisor
Client Relationship Manager

Financial Analyst
Investment Manager
Financial Services

SKILLS MOST REQUESTED BY TOP EMPLOYERS

General Principles of Financial Planning
Insurance Planning
Investment Planning
Income Tax Planning
Retirement Planning
Estate Planning
Professional Conduct & Fiduciary Responsibility
Interpersonal Communication

ONLINE CAREER FAIRS



TWICE A YEAR, THE CAREER CENTER OFFERS ONLINE CAREER FAIRS THAT BRING TOGETHER EMPLOYERS AND JOB SEEKERS FOR LIVE NETWORKING.

The CFP Board Career Center is one of the best resources for finding jobs in the financial planning industry. It is provided by a reliable source, is easy to use, and opened the door to a great job.

- Barbara Lommen, Financial Planner and Associate Advisor, Sargent Bickham Lagudis

VISIT CFP.NET/CAREER-CENTER