SYNERGY FINANCIAL GROUP

www.synergyfg.com

Position Title: Director of Financial Planning
Position: Remote, PST or MST time zone
Employment Type: Full Time
Hours: Monday-Friday; 8am-5pm PST

The Opportunity: The Director of Financial Planning role serves as a senior planning leader within the firm. This role is ideal for an experienced financial planner who enjoys solving complex planning problems, developing thoughtful strategies, and contributing to a high-performing advisory team. This position works closely with the CEO and planning team to evaluate complex client planning situations, develop and analyze financial strategies, support sophisticated planning discussions with clients, and elevate the firm's overall financial planning capabilities.

This role plays an important part in executing Synergy's proprietary financial planning loop framework, ensuring that clients receive coordinated advice across every area of their financial lives.

About Us: Synergy Financial Group, LTD. is a fee-only Registered Investment Advisor (RIA). As a boutique, multi-family office in Silicon Valley, we provide comprehensive financial planning services to a select clientele of High-Performance Professionals™ around the world. Our philosophy centers on helping clients build and preserve wealth by integrating investment strategy, tax planning, estate planning, and financial decision-making across the entire balance sheet.

We operate as a boutique advisory firm serving a limited number of clients, allowing our team to deliver thoughtful, sophisticated advice while maintaining a collaborative and intellectually curious culture.

Key Responsibilities:

- Client Meeting Support - Assist in preparing for and participating in planning-focused client discussions. Responsibilities include:
  - Preparing financial planning analyses and presentation materials
  - Supporting complex planning discussions during client meetings
  - Clearly explaining strategies and tradeoffs when appropriate
  - Collaborating with the CEO to evaluate planning decisions and recommendations
  - Client interaction will focus primarily on planning strategy, not sales or relationship management.
- Planning Loop Execution - Operate within Synergy's internal planning framework and ensure planning deliverables are executed with precision. Responsibilities include:
  - Running financial planning analyses using eMoney and FP Alpha
  - Executing planning workflows through Advyzon
  - Building and updating financial models and planning scenarios
  - Documenting planning recommendations and internal planning notes
- Strategic Planning Development - Collaborate with the CEO and advisory team to continually improve the firm's planning capabilities. Responsibilities include:
  - Refining Synergy's internal planning frameworks and processes
  - Contributing to the firm's planning knowledge base
  - Identifying opportunities to enhance planning workflows and deliverables
  - Helping build scalable planning systems for the firm

- Internal Advisory Leadership - Serve as a senior planning presence within the firm. Responsibilities include:
  - Providing insight on complex planning cases
  - Supporting and mentoring junior planners and paraplanners
  - Contributing to a culture of intellectual curiosity and continuous improvement
- Client Complexity - This role involves planning for high-net-worth and ultra-high-net-worth families, often requiring analysis of complex financial situations such as: Multi-entity tax planning, Concentrated equity positions, Trust and estate structures, Liquidity events and business ownership, Advanced retirement and distribution strategies, Candidates should be comfortable evaluating tradeoffs across tax, investment, estate, and cash flow planning decisions.
- Ideal Candidate Profile - We are seeking a thoughtful and capable financial planning professional who enjoys solving complex problems and contributing strategically within a boutique firm. The ideal candidate demonstrates:
  - Strategic Thinking - Ability to synthesize complex financial situations and identify meaningful planning opportunities.
  - Technical Depth - Strong understanding of financial planning concepts across tax, estate, retirement, and investment planning.
  - Clear Communication - Comfortable explaining financial planning concepts and strategies in a clear and thoughtful manner.
  - Ownership Mindset - Takes responsibility for delivering high-quality work and improving planning outcomes.
  - Continuous Improvement - Seeks ways to strengthen planning processes and elevate the firm's intellectual capital.
- Other duties as assigned.

Qualifications:

- Minimum of 5 years of in financial planning experience
- Ability to manage multiple planning projects simultaneously
- Familiarity with eMoney, FP Alpha, and CRM systems such as Advyzon preferred
- CFP® designation preferred
- Ability to work independently with a high degree of self-direction and adaptability, proactively managing multiple tasks and promptly addressing client needs.
- Excellent organizational and problem-solving skills, with exceptional attention to detail and follow-through.
- Proficiency in computer applications such as Adobe Acrobat Pro, CRM systems, and Microsoft Office Suite (Windows, Word, Excel, PowerPoint).
- Bachelor's degree in finance, accounting, economics, or related field preferred
- Collaboration skills and the ability to thrive in a team-oriented culture.
- Maintains high ethical standards and confidentiality, exercising discretion when handling sensitive information.
- Strong analytical, organizational, and communication skills