HABER WEALTH MANAGEMENT

hwww.haberwealthgroup.com

Position Title:	Financial Planning Associate
Location:	Conroe, TX
Position:	In Office
Employment Type:	Full Time; 40 hours; Monday-Friday

Overview:
The Financial Planning Associate supports the delivery of comprehensive financial plans while helping ensure a seamless, high-quality client experience. This role includes preparing meeting materials, building and updating financial plans in eMoney, participating in select client meetings, and assisting with follow-up and ongoing client needs. The Associate also supports client onboarding, account servicing, and money movement, working closely with Advisors to keep all client information accurate and up to date. This is a great opportunity for someone who is detail-oriented, collaborative, and eager to grow their role in a relationship-focused planning environment.

About Us;
Haber Wealth Management is a boutique, relationship-focused advisory firm dedicated to helping individuals, families, and business owners build what matters and protect what lasts. With more than 30 years of experience, our team provides holistic financial planning, investment guidance, and insurance solutions designed to simplify complexity and support confident decision-making. We take pride in delivering personalized service, fostering long-term, multi-generational relationships, and empowering clients to move through every stage of life with clarity and purpose.

Job Responsibilities:
- Prepare client review materials and ensure that data required for review is accurate
- Assist with preparation for client meetings including drafting financial plans in eMoney and participate in client meetings, building the plans live, as needed.
- Demonstrate technical understanding of each client's financial situation and planning objectives.
- Support the client onboarding process by completing financial plan and investment proposals within the appropriate software applications and/or assisting with new accounting opening.
- As needed, assist with client requests and prepare paperwork including, but not limited to, opening new accounts, closing accounts, transferring assets, deposits, withdrawals, Required Minimum Distributions (RMDs), etc.
- Conduct 401(k) rollover calls with limited supervision
- Track all client updates and interactions in CRM (Salesfoce), as well as assign and complete client-related tasks in CRM via Workflows
- Other duties as assigned

Qualifications:
- Minimum 3 years of paraplanning, operations, administrative support in wealth management.
- Preferred or willingness to pursue: FINRA Series 7 and 66 and Texas Life and Health Insurance
- Familiarity with Holistiplan, Pershing (NetX360), Salesforce, Envestnet, eMoney preferred
- Ability to work independently with a high degree of self-direction and adaptability, proactively managing multiple tasks and promptly addressing client needs.
- Strong problem resolution skills
- Detail-oriented with a high degree of accuracy
- Exceptional organizational skills: ability to multi-task and follow up to meet deadlines
- Highly competent computer skills and advanced knowledge of Microsoft Office Suite (Word,

Excel, PowerPoint, Outlook, Teams), Zoom, Adobe Acrobat,
- Exceptional oral, written, and interpersonal communication skills
- Impeccable ability to maintain confidentiality and integrity
- Energetic, eager to learn, and willing to cooperate in a team environment as a team player

Additional Details:

- Full Time; 40 hours per week
- In Office role at Conroe Location
- Benefits Eligible: Health Care – Medical, dental, vision, Life Insurance, 401(k) retirement plan with employer match contribution, Paid Time Off, and holiday hours
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.