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 will be a hybrid role – leading key initiatives for the firm and clients. This role supports our wealth management clients by leading the annual tax filing process for W-2 and 1099 individual tax returns with accuracy and exceptional client communication. This role will also support financial planning tasks outside of tax season based on experience and capacity. This could include preparing financial plans and client review materials, conducting investment research, updating data across planning software and CRM systems, and assisting with meeting preparation and follow-up. The ideal candidate brings strong technical skills, exceptional attention to detail, and the ability to collaborate effectively with Advisors and the client service team to ensure seamless execution of financial strategies

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:
- Lead Individual tax filing process for firm clients specifically: W-2 and 1099 individual tax returns
    - Meet with clients directly to guide them through the tax filling process.
    - Organize, and verify client tax documents; identify missing information and follow up promptly.
    - Communicate with clients regarding required documents, timelines, and tax-related questions.
    - Coordinate e-filing, extensions, and amended returns when necessary.
    - Maintain secure and organized tax records and documentation.
    - Ensure all filings meet federal and state compliance standards.
    - Collaborate with leadership to strengthen our tax advisory systems and processes
- 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.
- Minimum 1 year of paid tax filling experience filing 30 or more federal and state individual tax returns per tax season using professional tax preparation software preferred.
- Preferred or willingness to pursue: FINRA Series 7.
- 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.