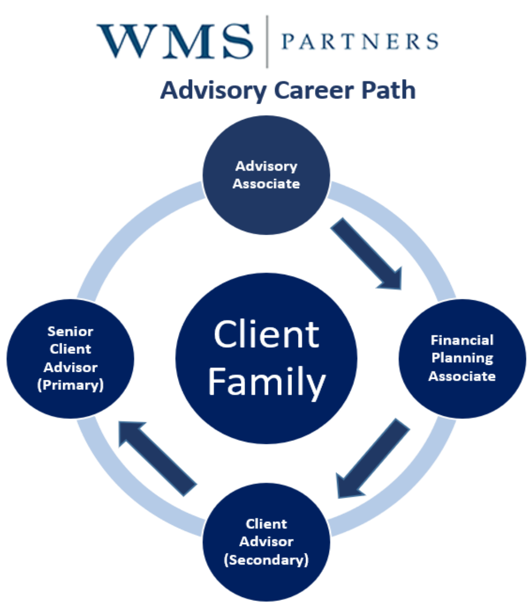
Financial Planning Associate

Job Description:

The Financial Planning Associate ("FPA") works in a support role directly with Client Advisors and Senior Client Advisors across the firm. He/she will work within the Advisory Team, supporting advisors, other associates, portfolio managers, and financial planning specialists.

Duties and Responsibilities Include:

- Work independently and with Senior Client Advisors to manage client service, including scheduling, preparing for, participating in, and leading client meetings
- Prepare and participate in the delivery of financial planning concepts for client meetings
- Collaborate with portfolio managers on the investment management of client portfolios, which include public and private investments
- Assist in overall management of process, preparation, and follow-up for client meetings
- Work with WMS team to develop, enhance and/or refine company's procedures and policies
- Complete Special projects as needed



The FPA is meant to be a support role with mentoring from experienced Advisors at WMS Partners. Successful FPA candidates will simultaneously complete professional designation coursework while applying these concepts in real life case studies as they work as part of our client teams.

Desired Skills and Experience:

- 2 to 4 years of relevant industry experience preferred
- Excellent written and oral communication skills
- Client first attitude, professional demeanor, personal integrity and an understanding of fiduciary responsibility
- Ability to multi-task and manage time effectively
- Self-motivated, confident, detail-oriented, and analytical
- Willingness to take on additional operational responsibilities as needed

Qualifications:

- Bachelor's Degree from an accredited college or university (required)
- Demonstrated desire or progress toward the CFP, CFA of CPA designation
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as experience with financial planning, client relationship management (CRM) and portfolio management (PM) software

Salary and Benefits:

- Pay/benefits are competitive based on industry standards.
- Bonus eligible
- Benefits including 401(k)/profit sharing plan, health insurance, paid holidays, vacation and tuition assistance
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities, if applicable. Support amount will be determined by management each year.

About WMS Partners:

Founded in 1993 and headquartered in Towson, MD, WMS Partners has over 50 employees and currently manages over $3.6 Billion in assets for approximately 400 families.

We are a fee-only financial advisory and investment management firm. We customize our advice to each client, providing them with recommendations and implementation assistance to meet their specific goals and needs. Our client's families consist of professionals, retirees, corporate executives and business owners. The Firm's continued growth is primarily due to referrals from its existing client base.