

## **Financial Planner**

### **SUMMARY:**

Develops and implements financial plans for individuals, businesses, and organizations.

Job Functions include: (Note: this is a representative list only - complete list provided with purchase)

- Interviews customers to determine customer's assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives.
- Analyzes customer's financial status, develops financial plan based on analysis of data, and discusses financial options with customer.
- Prepares and submits documents to implement plan selected by customer.
- Refers customer to other endorsed vendors to obtain services outlined in financial plan.

(also details Supervisory Responsibilities, Qualifications, Education and/or Experience, Language Skills, and work environment)