



Founded in 1985, [RGT Wealth Advisors](#) is a nationally recognized firm and one of the largest independent, financial planning/wealth management firms in the area. As we continue to grow, we are looking for great people to join our team. And we treat our team members with the same care and respect as our clients. That's why we have been named one of the best places to work by the *Dallas Business Journal*.

## Position

We are currently interviewing for a **Financial Planner** position in our Dallas office. This person will be responsible for assisting Directors and Senior Financial Planners with providing financial planning services to our clients. This will include financial independence / retirement planning, education planning, risk management, estate and charitable planning, tax coordination, budgeting, bill processing and cash flow, net worth statements, etc. Candidates must be able to manage a heavy workload and work efficiently. As a position focused on client service, some after-hours work will be required based on client needs. The ideal candidate is positive, friendly, dependable, organized, a self-starter who takes initiative, a hard worker, and eager to continue in their professional development.

## Qualifications

- CFP® Candidate / Commitment to obtain CFP® Certification.
- CPA, CPA Candidate, or J.D. preferred, but not required.
- Bachelor's degree required. Graduate degree preferred, but not required.
- 1-3 years of accounting, financial planning or professional experience.
- Basic understanding of financial planning concepts and investments.
- Proficient in Microsoft Office Suite, including Excel.
- Excellent computer skills.
- Communicates effectively, both orally and in writing, with strong interpersonal skills.
- Very organized with a strong attention to detail.
- Able to perform several tasks concurrently, to prioritize work, and to take direction from multiple people.
- Strong analytical and problem-solving skills.
- Ability to work quickly and accurately in order to meet deadlines.
- Extraordinary client service attitude with a desire to develop long-term relationships with clients.
- Team player with the ability to assist, mentor, and inspire others.
- High standards of professionalism, ethics, and integrity.

## Firm Overview

At [RGT Wealth Advisors](#), our purpose is to serve as our clients' trusted advisor. We partner with our clients to evaluate and achieve their financial and life goals by helping them identify opportunities and navigate complex decisions, thereby contributing to their peace of mind. Our Core Values guide every action we take as individuals and as a firm. They determine how we serve clients, reward and hire employees, and make strategic decisions. Our Core Values are: Service, Integrity, Teamwork, Performance, Strategic and Professionalism.

## How to Apply

If you are interested in joining the team, please send us an email with a cover letter and resume (including GPA for each college attended) to [resumes@rqtadvisors.com](mailto:resumes@rqtadvisors.com). Please include the position of interest and office location in the subject line.