Sr Financial Planner (Central Financial Planning Team)

Job Description

The primary role of the Central Financial Planner is to lead the National delivery of financial planning services and advice to all Key Private Bank clients. This position serves as a national financial planning expert and thought leader, providing continuous coaching and training to market based advisors and developing a consistent culture of advice and planning across the organization. The Central Financial Planner will work directly with market-based Client Experience Managers, Regional Planning Strategies, and Relationship Managers and to deliver customized advice to our clients.

Financial Planner Responsibilities

Leadership

- Onboard, train and continuously develop market-based advisors to adopt and effectively deliver the Key Private Bank Advisory Experience with a full understanding of process, tools and technology.
- Coaches market advisors to ensure solutions and advice are delivered effectively and consistently across geographies.
- Maintains an expertise of our planning tools and technology to train, review, and answer software questions and concerns.
- Collaborate, coach, and review financial plans completed in the field to ensure accuracy, consistency and all around best thinking on a national level to the local markets.
- Serves as a thought leader for Financial Planning and Advice topics, developing white papers, presentations, templates and tools.
- Expertise as a national subject matter expert for business succession, asset protection, and tax planning strategies for Key Private Banks high net worth clients.

Planning Expertise

- Partner with market based advisors to prepare financial plans and recommended solutions for Key Private Bank's high net worth clients.
- Collaborate with the market based advisors to create the best advice, recommendations and solutions from the plan findings.
- The Centralized planners serve as subject matter experts on technical planning issues and communicate daily with market-based client delivery teams to troubleshoot and create planning strategies.
- Strategize with the Client Experience Manager, Regional Planning Strategist or Relationship Manager to develop the financial plan to be presented and the financial story with recommendations to communicate with the client.

Sales

- Participate remotely through use of technology to partner with Key Private Bank team members to acquire new business and retain/expand existing relationships.
- Maintain broad knowledge of KeyCorp products and services and recommend when appropriate.
- Develop marketing, education and training initiatives to achieve financial planning goals and objectives.

Required Qualifications

- CFP Designation (or other appropriate Personal Financial Planning designation or its equivalent)
- 5- 7 years financial planning experience.
- 5- 7 years of broad based banking/investment/sales experience.
- 3- 5 years of client management experience and proven client relations orientation.
- In-depth experience with financial planning software applications
- Ability to transfer strategy to tactical plans and implement.
- Ability to manage multiple projects at various stages of completion.
- Self-motivated, goal and results driven.
- Strong leadership team collaboration skills.
- Expert Client Discovery and Communication Skills.
- Excellent written, verbal and presentations skills.
- Comfortable with new technology, web and cloud based applications.

FLSA STATUS: Exempt

KeyCorp is an Equal Opportunity and Affirmative Action Employer committed to engaging a diverse workforce and sustaining an inclusive culture. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or veteran status.

Link to Apply: https://careers.key.com/en-US/job/senior-financial-planner-central-planning-team/J3T3WY6JGWMTN7G6509

Questions:

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