



Yeske Buie Open Position – Assistant Financial Planner

Yeske Buie, one of the most respected and influential financial planning firms in the country, is seeking to hire a self-motivated, relationship-driven, and values-centered team player with a resilient, upbeat attitude and a passion for learning for the role of Assistant Financial Planner in our San Francisco, CA office.

About Yeske Buie

On paper, Yeske Buie is an independent, fee-only financial planning firm with over \$750M in assets under management. We specialize in helping our Clients safely spend from their portfolios, intergenerational wealth planning, and fundamentally grounded investing that is implemented in a creative and disciplined way.

Beneath the surface, we're much more than that. At Yeske Buie, our mission is to empower people to pursue their limitless vision for their life – we call this their Live Big® life. This mission, along with our six core values, serve as the drivers for how we serve our Clients and interact as a team.

About the Role

While we are a process oriented and evidenced-based firm that is disciplined in our approach to serving Clients, we embrace the flexibility needed to truly serve the interests of our Clients and their unique circumstances, which is always our most fundamental and top priority. So, while no two days will be exactly alike in elevating the client experience, here's what you are likely to experience during a typical work week:

- **Meeting with Clients**
 - *Your role will initially be active listener and a note taker, with the goal of growing into a lead advisor as you learn TheLiveBigWay® approach to financial planning.*
- **Gathering Financial Planning Data from Clients**
 - *This includes drafting and sending Client emails, fielding Client calls, entering Client information into our databases, and creating and managing related tasks.*
- **Preparing and Implementing Financial Plans**
 - *You will turn that collected data into powerful, financial planning reports and recommendations. Your work will be reviewed by the Lead Advisor (the role you'll aim to grow into!) and posted on a Client's unique Client Private Page®.*

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- **Reviewing Client Accounts and Proposing Trades**
 - *Yeske Buie has a grounded investment philosophy. You will be a part of executing this philosophy by proposing trades and rebalancing accounts in line with our processes, and regularly reviewing reports including daily deposits and withdrawals.*
- **Completing Client Service and Administrative Tasks**
 - *We believe that becoming an expert in account maintenance requires a few years of experience in completing paperwork, moving money, opening/closing accounts, etc. As you grow in your role, other team members will assist you with these tasks.*
- **Designing, Implementing, and Managing Projects**
 - *Have an idea for a way to enhance our client experience or internal processes? Have a passion for a specific area of the business? Your efforts and ideas are welcomed and encouraged!*
- **Meeting with the Team**
 - *While you will have individual tasks and responsibilities, we always work in teams and sub-teams to serve our Clients and make progress on firm projects. You can expect at least 2 – 3 scheduled team meetings on your calendar each week.*

About the Ideal Candidate

Someone who will excel in this position will...

- Hold a degree from a CFP Board Registered Baccalaureate or Master's Program
- Take a Client-first approach to their work
- Demonstrate excellent written and verbal communication skills
- Have strong analytical and financial skills and be detail-oriented with a high degree of accuracy
- Be able to manage and prioritize tasks and projects through to their successful conclusion
- Enjoy working as part of a team and be able to work effectively and efficiently on their own
- Have a desire to learn and grow
- Be trustworthy, ethical, hard-working, and professional
- Be enthusiastic towards participating in the financial planning profession and community

About the Future

This position is an opportunity to build a fulfilling, long-term career. Your growth will be measured along our structured career ladder that includes tangible goals and milestones for growth from an Assistant Financial Planner to a Financial Planner, to a Senior Financial Planner. As we say with our

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Clients, however, while we have a structured process, your career is your own unique journey, and we look forward to working with you to design and support your personal and professional goals to empower you to pursue your Live Big® life.

We are happy to provide a competitive salary with bonus potential, fully paid (individual) health benefits, 401(k) with company match, financial support for continuing education and certifications necessary for career advancement, company paid FPA membership and conference attendance, a generous vacation policy, and regular team bonding events (i.e., annual staff retreats, social time, etc.).

Additionally, Yeske Buie is pleased to offer employees a hybrid work schedule. All employees are expected to work from our physical offices from Tuesday through Thursday, and may work from their own virtual office on Monday and Friday.

Lastly, in light of the COVID-19 pandemic, it is an expectation that every member of the Yeske Buie team will receive the COVID-19 vaccine and provide proof of vaccination.

What's Next?

We're excited to learn more about YOU! To apply for this position, please send us your resume, cover letter, and short essay answers to the questions below:

- Why do you want to work for Yeske Buie?
- What would you bring to Yeske Buie that is unique and special?
- What would you need from Yeske Buie to reach your highest potential?
- The organizing principle that runs through all aspects of Yeske Buie is *Live Big*®. What does *Live Big*® mean to you in your life?
- What are your expectations for your development as a member of Yeske Buie?

Please submit your information via email to Jobs@YeBu.com.

For your planning purposes, please see to the timeline below for more information on our entire interview process. Please note that every step of the interview process is not guaranteed to all applicants; you will be moved through the process as far as we see fit.

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