



Palisades Hudson Financial Group LLC

300 First Stamford Place, Suite 215 Stamford, CT 06902

Financial Planning Associate

Organization

Palisades Hudson Financial Group is a thriving tax accounting/financial planning firm with an asset management affiliate, Palisades Hudson Asset Management (PHAM). PHAM currently manages over \$1.2 billion in assets. We have offices located in Stamford, Connecticut; Fort Lauderdale, Florida; Atlanta, Georgia; Portland, Oregon and Austin, Texas. We are a fee-only organization. Palisades Hudson is a 45 minute commute from Grand Central Terminal. We offer a range of financial services for high net worth individuals.

Qualifications

BS, BBA w/GPA of 3.3+. CFP candidates encouraged. Entrepreneurial spirit. Interest in helping people. Fascination with money management is essential. Strong verbal and written skills. Accounting, finance and/or economics majors are encouraged to apply.

Salary

\$60K (includes 25% O/T), bonus and profit sharing (total package \$70K-\$80K)

Position description

Exposure to all areas of financial planning and investment management for high net worth individuals. This includes tax preparation and planning, financial and estate planning, research, reviewing financial statements, applying business and economics skills, and client contact.

Investment experiences at Palisades Hudson Asset Management (our registered investment advisor affiliate) include hands-on exposure to the asset management business, which entails conducting investment research, generating and creating monthly performance reports and assisting clients.

Additional opportunities involve participation in various projects key to the growth of the organization.

Contact information:

Ms. Melissa DiNapoli

Recruiting Manager

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