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FREEDOM FINANCIAL PARTNERS

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Position Title: Associate Financial Planner

I. Mission

Freedom Financial Partners (FFP) is on a mission to elevate the way that financial planning is done within our industry. We believe that our entire team is helping us build an experience for clients that is new and different. We are growing at a rapid pace and looking for an Associate Financial Planner to help us continue to build out that unique experience for clients centered around values-based financial planning.

As important as our client experience is to us (and it is really important!), we spend as much energy ensuring our employees are growing in their careers. We prioritize building out career paths for our team members including step-by-step advancement plans for employees. We also value building a culture that has team members excited to come to work and help us build a great organization together.

The Associate Financial Planner position is a central position within our seven-person company. This is a position where we are looking to grow future leaders and financial planners within the industry. We need an Associate Planner with incredible attention to detail. This is the type of person capable of keeping up with 50 tasks and not dropping the ball on any of them. We also need someone that excels in interacting with clients and is adding value to our relationships. Finally, we want someone that is a builder and willing to grow with the company as we get bigger. This person will be assigned company related tasks and help us buildout different areas of the firm.

II. Responsibilities

- Actively participate in all assigned Partner or Financial Planner client meetings.
- Act as the primary point of contact for all client interactions, working with team members to ensure a timely response to all client questions and concerns. Work with all team members on creating a next-level client experience.
- Expert ability to resolve client issues including understanding when to escalate potential client issues to Partners or Wealth Advisors as appropriate.
- Help lead firmwide projects that lead to a level of enhanced client service or streamlining of existing process.
- Actively document all notes and action items during client meetings and ensure all commitments made by the Partners or Wealth Adviser are being completed in a timely manner.
- Review task assignments for each client and work directly with team members to ensure all follow-up and action items as a result of client meetings are documented in Redtail and completed within the specified time frame.
- Under the direct oversight of the Partners or Financial Planners, actively engage in Client Case Prep meetings, providing recommendations and feedback relative to the client's financial plan as appropriate.
- Responsible for reviewing statements, forecasting review data, developing a meeting agenda format, creating presentations, case documentation and deliverables for all assigned clients.
- Manage developing and maintaining suitability documentation utilizing client file standards.
- Ensure compliance notation is adhered to; demonstrate suitable and appropriate recommendations to ensure quality standards, including full and fair disclosure. Initiate, process and follow-up on new business, including the accurate completion and execution of all money movement related tasks.

- Establish and maintain exceptional relationships with existing firm clients to ensure client satisfaction.

III. Skills and Knowledge

- Bachelor's degree or higher in Finance Planning, Business, or a related field required.
- CFP® or demonstrated progress toward acquiring the CFP® is a plus.
- 2+ Financial Services experience is a plus.
- Desire to grow in career within teams-based financial planning structure
- Strong people skills are imperative
- Demonstrates analytical ability, good judgment, problem solving, responsibility and personal integrity
- A self-starter with a strong sense of ownership, positive professional attitude and demeanor
- Proficient in Microsoft Office (Word, PowerPoint, Excel, Outlook & Teams)
- Excellent customer service, oral and written communication skills
- Professional and articulate with strong attention to detail
- Ability to work efficiently, effectively and independently to see projects through to conclusion
- Excellent time management, strong organizational skills, ability to prioritize multiple tasks and anticipate potential problems

About Us

Freedom Financial Partners helps our clients answer the following questions: "Am I OK?" and "Can I live the life I want?" We help improve our client's lives by bringing truth, understanding and discipline to the financial choices they make every day. We use simple, yet powerful tools and processes to uncover the "why" behind money. From there, we tailor advice, a financial plan and an investment strategy to help our clients meet their life goals – not just their financial goals.

We believe in being transparent about our core values and what the culture looks like at Freedom Financial which is why we have created the Culture Guide below. This is extremely important to us so please do not hesitate to ask us any questions related to it.

Culture Guide

Empathy

- You seek to build deep relationships with clients and coworkers.
- You genuinely seek to understand others' points of views.
- You listen well and seek to understand before reacting.
- You spot those employees struggling and seek to lift them up.

Commitment/Dedication/Attentiveness

- You care intensely about the success of other employees and Freedom Financial.
- You take extreme ownership of your work.
- You are not shy about suggesting areas of improvement and implementing them.
- You understand the small details matter for the work we do on behalf of our clients.

Integrity

- You do the right thing when no one is watching.
- You treat all employees and clients with respect and seek to unify.
- You are not afraid to respectfully give difficult feedback to colleagues and FFP when needed.

- You admit mistakes freely and openly.

Excellence
- You seek to deliver excellent work in all situations.
- You demonstrate consistently strong performance so colleagues can rely upon you.
- You make your fellow employees better and help clients live better financial lives.
- You relentlessly executing on behalf of the firm and clients.

Gratitude
- You take time to express genuine appreciation for those at work weekly.
- You are grateful for the clients who choose to work with us.
- You are able to recognize the positives even in more difficult situations.

Empathy

In the world that becomes more divided by the day, we feel that our ability to display empathy with each other and our clients is one of the most important aspects of our culture.
Every employee, service provider, prospect, client, and former client who walks through our doors does so as an individual. We seek to treat them as individuals. To understand and empathize with their unique perspectives and experiences.

We understand that we will not agree all of the time. Conflict will occur and that's okay. Because conflict can be healthy. Healthy, respectful conflict encourages growth – both of the individual and the firm.

We will seek to build deep, caring relationships with our clients and colleagues. For our colleagues, this doesn't necessarily mean that we are hanging out all the time outside of work. It means that our relationships with our colleagues are deeper than transactional relationships and that we care about each other. This is done by being able to listen well and empathize with others' points of views. It is also be done by being proactive in looking out for colleagues, or even clients, who are struggling and seeking to lift them up.

Commitment/Dedication/Awareness

The people that work at Freedom Financial Partners are about more than just punching a clock. We are about a long-term company that is bigger than the individual parts. We know that building process will require an uncommon commitment and dedication from our entire team.

Growth often requires change. Change requires tension. We are committed to growing our firm even if that necessitates individual or group change. We are grateful for our clients, for our business partners, for each other because they have helped us grow to this point.

We know the level of service required in this industry exceeds those of most others. For most clients, we are working with a large majority of their net worth. This means any of our client-facing work requires an extreme level of detail so clients are confident in the work we are doing on their behalf. We hold our entire team to extremely high standards for all work but particularly client-facing work.

Integrity

We seek to hire and retain a diverse team of high-performing professionals. We know that our team carries different viewpoints into the workplace. We ask that our team members treat all employees and clients with the same sense of respect regardless of political or other views. We are all united in building a great company during working hours at FFP.

We don't shy away from problems, nor do we seek to create them. Problems are inherent to our industry. Things get done wrong. We receive incorrect information. Mistakes are made. Not always by us. Sometimes we are in a position where we inherit the problem. We still deal with it because it is the right thing to do for our clients and our firm.
"To err is human." – Alexander Pope

If we make a mistake, we own it. After we own it, we fix it. Then and only then do we examine how the mistake was made and seek to adjust through increased knowledge, training, or teamwork in an effort to not make that mistake again. We value this. Our clients value it more because it is this operating paradigm that lets them know we are going to take care of them no matter what.

We understand our default instinct can be to stay quiet and not give difficult feedback to either our colleagues or to the management team. We value those that, for the right reasons, choose to speak up and give honest feedback that seeks to help individuals or the entire organization grow.

<u>Excellence</u>
We are focused on providing first-class, excellent client experience. This is a daily practice we integrate into our procedures, our communication with clients, and interactions with each other. We let clients know what to expect and then seek to exceed that. Sometimes that means we need to seek new knowledge, leverage our colleagues, business partners, or our client's other trusted advisors.

The pursuit of excellence does not mean that we work excessively long hours all the time – or even most of the time. Our founders were seeking a better balance and integration between work and life than what they had previously experienced in their careers. We strive to have everyone working 40-50 hours per week. We want you to take your lunch break – eat, run errands, take a walk, workout – but take your lunch break. We want you to use your vacation time each year. It is important to rest and recharge.

This fundamental belief in better work/life balance and integration also means we give employees more freedom to handle their lives. We expect proactive communication about what you need. We will support you and work to find a solution that is the best fit possible for you and the firm. Sometimes this means compromising.

<u>Gratitude</u>
We understand that many in the world like to identify what is going wrong and much of the headlines around the country center around negative events.

We choose to take a different approach. We try and take specific time throughout the week to recognize those people and things that we are grateful for and do not hesitate to share.

We shy away from toxic positivity but do tend to approach problems and individual situations from a positive perspective.

We appreciate and are grateful for the clients that choose to work with us. We understand that many could have differing views of the world or that there may be days where they are not having their best days but we are able to take a step back and be grateful for their commitment to FFP.