



## Financial Planner and Workplace Financial Wellness Educator – Bilingual (English/Spanish)

Are you an educator or financial advisor with a passion for helping others? If so, we want to talk with you!

Francis LLC is seeking an experienced educator or financial advisor fluent in English and Spanish to serve as a financial planner, helping workers become better family financial managers without the sales pitch.

Francis LLC provides financial wellness programs and individual financial planning within the workplace, delivering services on-site and on-the-go. We think the traditional wealth management business is too focused on the wealthy. Francis delivers the money advice America's workers desperately need through an employer-sponsored financial wellness benefit. And best of all, no sales pitch is required.

Our ideal candidate has a passion for teaching, is understanding and empathic, willing to work hard, and derives deep satisfaction for helping others achieve the Work-Life-Money Balance that leads to strong financial futures and more fulfilling lives.

Here's what you'll do:

- Develop creative and practical, adult financial wellness curriculum.
- Provide on-site and web-based financial education and individual financial planning sessions for U.S. workers. This may include occasional work on different shifts.
- Advise workers on all money matters, including investment advice.
- Ensure that our customers love us.
- Create regular reports which document education and financial planning activities.
- Stay in the know with financial and retirement planning matters.
- Treat everyone you encounter with kindness and respect.
- Work collaboratively with your team planning programs and training.

Qualifications include:

- Bachelor's degree.
- A Series 65, Certified Financial Planner (CFP) or other similar industry designation is preferred but not required. Experience in the financial planning industry, adult education, and/or human resources field is preferred. The gift of teaching and a passion for helping others are required.
- Due to serving diverse groups of employees, fluency in English and Spanish is required.
- Strong presentation skills.
- Excellent communication and customer service skills (written and verbal).
- Great attention to detail and organization.
- Ability to travel (up to 40%) to deliver education and planning sessions onsite at client locations.

This is a unique opportunity to join the Francis team as a full-time salaried coworker enjoying a generous benefit package including a sabbatical program, and collaborative work environment.

### Who We Are

Francis LLC is a nationally recognized and award-winning retirement plan consulting and financial education organization with offices in Brookfield, WI, and Minneapolis, MN, and Chesterfield, MO. We provide investment consulting and participant financial wellness education to qualified retirement plan sponsors and their participants. As an independent Registered Investment Advisor with no broker/dealer affiliations, Francis does not sell investment products nor receive compensation from the organizations or investment product we recommend. Francis currently consults to over \$12.5 billion in customer assets.

### Application

Send cover letter and resume to Susan Salmon, Director of Operations, at [susan.salmon@francisway.com](mailto:susan.salmon@francisway.com).

The above statement reflects the general details necessary to perform the principal functions of the position described and shall not be construed as a detailed description of all the work requirements that may be inherent during your employment.