



## Job Title: Part-Time Financial Planning Associate

Job Start Date: Early 2021

Location: Virtual

Application Closing: November 15<sup>th</sup>, 2020

Interviews will be conducted on a rolling basis. A hiring decision will be made by December 15<sup>th</sup>, 2020.

### Overview

Pavlov Financial Planning is a fee-only financial planning firm that focuses on serving globally mobile clients and multinational families beyond the traditional asset management and country-pair cross-border planning mold.

We understand that through their lifetime clients may move to more than one country, married someone from another country, immigrate, and raise children with more than two citizenships. No one can service this population alone and we pioneered a service model that bring together advisors around the world to serve everyday people.

This position will allow you to learn, shadow and contribute to an evolving financial planning process to serve a dynamic client base.

### Job Duties

- Update internal planning tools and templates in the Microsoft Office suite.
- Learn and document the company's financial planning process.
- Perform research into specific financial planning topics.
- Review past educational materials and update references, data, and graphs as needed.
- Evaluate new tools, apps, and technology to aid in the financial planning process.

### Work Requirements

- Able to work 5-10 hours per week beginning in January 2021. (More hours are possible but not guaranteed.)
- Have consistent Internet access and your own computer with video conferencing capability.

### Mandatory Qualifications

- Currently enrolled in Accredited college programs or above in a personal finance related field OR in courses meeting Certified Financial Planner educational requirements.
- Proficient in Microsoft Word, Excel, and PowerPoint.
- Demonstrated interest in cross-border, international financial planning.

### Preferred Qualifications

- Ability to independently research topics and/or accomplish tasks.



- Attentive to form and function in equal measure.
- Visual thinker that can translate pictures into words, and vice versa.
- Relentlessly focused on process improvement and/or identifying alternate approaches to achieve goals

## Compensation

- USD \$12 to \$22 per hour, commensurate with education and experience.
- Fixed reimbursement for using your own equipment to work virtually.
- Eligible for a grant equal to 10% of earned pay to obtain continuing education after working in the position for at least six months.

## To Apply

Send an email to [huichin@pavlofp.com](mailto:huichin@pavlofp.com) with link to access your cloud storage folder containing the following:

- Resume
- Proof of enrollment or completion in financial planning program meeting Certified Financial Planner educational requirements.
- Statement of no more than 150 words on why you are interested in this particular position.
- An Excel Spreadsheet that you created for any purpose and of which you are proud.
- A visual aid you created in Word or PowerPoint for any purpose in which you summarized a complex idea, process, or system in a simple way.

Only selected applicants will be contacted for interviews.