Financial Planning Associate
Location: Ft. Lauderdale, FL

THE OPPORTUNITY

Sterling Wealth Advisors® is seeking a Financial Planning Associate to join our Ft. Lauderdale, FL team. This role offers a collaborative, growth-oriented environment with opportunities for career progression and professional development. If you have a passion for financial planning and a client-first mindset, we'd love to hear from you!

COMPENSATION & BENEFITS

We offer flexibility in work hours with two compensation options:

- Full-time (40 hours/week): $70,000 annually (with CFP) plus a 401(k) match and three weeks of paid vacation.
- Part-time (30 hours/week): $52,500 annually plus a 401(k) match and two weeks of paid vacation.

ADDITIONAL BENEFITS INCLUDE

- Sponsorship for continuing education, including Series 65, CFP, CFA, EA, and CKA designations.
- A supportive, expert team with a strong work-life balance—summer months are typically more relaxed for internal projects, while spring and fall are client-focused.
- Mentorship from Elizabeth Barrett, CFP®, AIF®, CKA®, and M.A. in Counseling Psychology, offering a unique perspective on financial planning and behavioral finance.

WHAT YOU'LL DO

- No sales required—focus purely on financial planning.
- Prepare for client meetings using top-tier financial planning software.
- Develop financial planning deliverables, including estate planning summaries, insurance analyses, retirement projections, and investment reviews.
- Organize client information, prepare plan recommendations, and assist with implementation.
- Attend client meetings to document decisions and action items.
- Guide clients through financial tasks via Zoom, such as funding HSAs, enrolling in Medicare, allocating 401(k)s, freezing credit, and more.
- Participate in tax-planning and tax-return review meetings with our CPA partners.
- Develop tax-planning and retirement scenarios.

WHAT WE'RE LOOKING FOR

- Strong computer literacy, including Excel and Word, and basic 1040 tax knowledge.
- Commitment to obtaining Series 65 within 60 days and passing the CFP exam within six months.
- Background in tax, accounting, counseling, or teaching is a plus.
- Passion for client service, financial planning, and continuous growth.
- Excellent organizational skills and strategic thinking to enhance client-service systems.

About Sterling Wealth Advisors®

Sterling Wealth Advisors® is a fee-only fiduciary firm specializing in financial planning, retirement planning, investment counseling, and tax strategy. We are committed to helping clients align their financial decisions with a fulfilling and purpose-driven life. We do not sell products and only work for our clients.