

Director financial planning to join one of the largest in-house independent broker/dealer investment planning groups. Responsibilities: day-to-day management of delivery of centralized financial planning guidance, services and platforms; management of team of centralized financial planning specialists and client service and supp. personnel; training and motivation of financial planning group and internal and external audiences on offerings and capabilities. Interface with business partners to enhance internal collaboration and drive group visibility to field and drive financial planning implementation to company platforms. Must have a minimum of 7 years of experience in financial planning. Position based in San Diego, CA.

Please submit resume to: [tom@usexecutivesearch.com](mailto:tom@usexecutivesearch.com)