

JOB OPPORTUNITY: FINANCIAL PLANNER (CONTRACT)

Contract Hours and Compensation:

Remote and **Fixed** Contract up to 50 hours per month at \$25.00 per hour with flexible schedule

Our Cooperative:

Money Positive Cooperative is Women and Queer-owned and provides progressive, approachable financial planning. Our team focuses on goals-oriented budgeting, values-aligned investing support, and financial literacy for under-recognized communities. As a worker-owned cooperative, we believe in democratic ownership, engaging in anti-racism education, and framing finances as a source of empowerment.

Qualifications and Responsibilities:

- **Women, People of Color, Queer, and People with Disabilities are strongly encouraged to apply,**
- Series 65 or 66 license or able to become licensed within 30 days,
- Basic understanding of investment and financial planning strategies (i.e. Equities, Fixed Income, Crypto, Derivatives, retirement planning),
- Experience with Diversity, Equity, and Inclusion (DEI) Policy and Strategy preferred
- Knowledge of Google Workspace and experience in financial planning software preferred (We currently use Right Capital),
- Delivery of professional and empathic services, putting clients' financial security first,
- Delivery of investment advice that aligns with clients' financial situation, risk profile, and personal values,
- Representation of Money Positive at events and in prospective client interactions,
- The ability to communicate complicated concepts effectively and in an approachable, judgment-free manner,
- The discipline to independently manage your own schedule of client meetings, preparation, and timely follow-ups [skills: time management, zoom/google meet, agenda setting, calendar planning],
- Ability to build trust, consensus, and forward momentum by consistently supporting clients in adjusting and meeting their financial goals.

To Apply:

Email your resume to support@moneypositive.com before **January 10th, 2025**.

Questions About The Position?

Contact us at support@moneypositive.com for more information. Thank you for your time!

Money Positive recruits, employs, trains, compensates, and promotes regardless of race, religion, color, national origin, sex, sexual orientation, gender expression, disability, age, veteran status, pregnancy, and pregnancy outcomes, as well as reproductive healthcare and autonomy and other protected status as required by applicable law.