CAREERS

Financial Planner

FULL-TIME · $75,000 – $85,000

A planner who builds the financial plans our clients actually live by — and then keeps them true as the business, the family, and the market move underneath them.

ABOUT KFG

An integrated firm built around business owners.

Founded in 1998, Keller Financial Group is an integrated advisory firm built around business owners. We bring bookkeeping, tax, financial planning, investments, and business advisory together under one roof, then serve owners across the full ownership lifecycle: building the company, preparing for and navigating a transition, and stewarding the wealth and legacy that follow.

Now in its second generation of ownership, KFG is at an important inflection point. We have proven an integrated advisory model that combines the strategic depth of experienced advisors with the focus, continuity, and care of a close-knit, operator-minded team. We are now ready to scale that model thoughtfully, expanding our capacity while preserving the quality, judgment, and long-term relationships that make it work. Financial planning is where that integration becomes visible to the client, because it is the one document that has to hold the business and the household at the same time.

ABOUT THE ROLE

Own the plan, not a slice of it.

KFG is seeking a Financial Planner to develop and maintain financial plans for clients across our roster, many of whom are business owners. This is a hands-on planning role: you will do the modeling, write the analysis, and stay with the plan long after it is delivered.

We have written it for someone one to two years into their career who has strong fundamentals and wants real responsibility sooner than a large firm would offer it. You will not be assembling slides for someone else to present. You will build the plan, sit in the meeting where it is discussed, and hear directly what the client makes of it.

Most planning roles at this level are narrow by design — a retirement projection here, an insurance review there. Ours is not, because our clients are not. A business owner's plan has to account for the entity, the compensation structure, the eventual sale, and the household that depends on all three. You will learn to hold that whole picture with experienced advisors a few steps away.

WHAT YOU WILL HELP BUILD

Four things we are building, with you.

01	A planning process that treats a business owner’s company and household as one financial picture rather than two engagements.
02	Living plans that get maintained on a real cadence, so the advice reflects what is true this quarter rather than what was true at onboarding.
03	Reusable modeling, templates, and documentation that make a rigorous plan faster to produce without making it generic.
04	A planning function with enough depth and continuity to carry client relationships as the firm grows.

KEY RESPONSIBILITIES

The work itself.

Plan Development

- Build comprehensive financial plans covering retirement, cash flow, tax, insurance, education, and estate considerations.
- Model scenarios that matter to owners: a business sale, a liquidity event, a change in compensation structure, an early exit.
- Gather and organize client data, then reconcile it against custodial statements, tax returns, and business financials.
- Prepare the analysis, written summaries, and materials used in client planning meetings.

Plan Maintenance

- Keep plans current on a defined review cadence, updating balances, assumptions, and goals as circumstances change.
- Track progress against plan and flag the gaps that need an advisor conversation.
- Document changes to a client’s situation, decisions made, and the reasoning behind them.
- Prepare review meeting materials and follow through on the action items that come out of them.

Client & Team Collaboration

- Participate in client meetings alongside senior advisors, and take the notes and follow-ups that keep the plan moving.
- Work with the tax team so planning assumptions and tax positions stay consistent with each other.
- Coordinate with the investment team so the portfolio reflects what the plan actually requires.
- Respond to client questions on plan mechanics, projections, and account details.

Process & Tools

- Maintain client records and plan data in our planning software and CRM.
- Improve planning templates, checklists, and workflows as you find better ways to do the work.
- Support onboarding for new planning clients, including data gathering and initial plan construction.

WHAT WE ARE LOOKING FOR

Experience and disposition.

- One to two years in financial planning, wealth management, or a related role at an RIA, bank, brokerage, or planning-focused firm.
- Comfort with financial planning software and a genuine facility with spreadsheets and modeling.
- Sound grasp of the fundamentals: time value of money, retirement and cash-flow projection, tax-aware planning, and account types.
- Clear writing. Much of the deliverable is explanation, and a plan a client cannot follow has not done its job.
- Care with detail, because a wrong assumption compounds quietly through an entire projection.
- Curiosity about business owners specifically — how companies are structured, how owners get paid, and what a sale does to a household.
- A demonstrated commitment to personal and professional growth.

Credentials. CFP® certification is not required. Candidates who hold it, are actively pursuing it, or intend to start are strongly preferred, and we support the coursework and exam.

COMPENSATION

$75,000 – $85,000.

Depending on experience and credentials, plus health, dental, and vision insurance, a retirement plan with company match, and 20 days of paid time off. You will also have direct access to the firm’s senior advisors, hands-on exposure to complicated business-owner issues, and the opportunity to influence the systems and processes the firm uses as it grows.

WHY THIS ROLE IS DIFFERENT

Five reasons to start a planning career here.

You will build plans, not assemble decks.

At this level most planners are handed a narrow piece of an analysis someone else owns. Here the plan is yours to construct end to end, with review and support rather than supervision.

Business owners make you a better planner, faster.

An owner’s plan forces you to understand entity structure, compensation, deferred taxes, and a concentrated illiquid asset that may become the whole retirement. It is the fastest planning education there is.

You will see the client, from the start.

You will be in review meetings early, hearing how people actually respond to the work. Planners who spend three years away from clients learn the mechanics and miss the point.

Tax and investments are down the hall.

When a projection depends on a tax question, you will ask the person who prepares the return. That closes a loop most planners never get to close.

Room to grow into the seat you want.

This role can develop toward lead advisor, planning specialist, or deeper technical work. We would rather build that path with you than hire around you later.

WHO WILL THRIVE HERE

Early career, high ownership.

This role suits someone with a year or two of solid grounding who is ready to be trusted with real work and wants the client contact that usually comes much later. You should be comfortable being the person responsible for a plan being right, and comfortable asking for help when it is not obvious that it is.

Who this role is not for. This is not a sales or business-development seat — the work is the plan and the client relationship behind it. It is also not a fit if you want to stay in the model and out of the meeting, or if you would rather specialize narrowly than learn the whole picture.

HOW TO APPLY

Send us a note.

Email your resume to info@kellercpa.com, along with a few sentences about what you are looking for. Every note reaches a person here, and we answer.