



Palisades Hudson Financial Group LLC

200 S.W. First Avenue, Suite 1250 Fort Lauderdale, FL 33301

Client Service Associate

Organization

Palisades Hudson Financial Group is a thriving tax accounting/financial planning firm with an asset management affiliate, Palisades Hudson Asset Management (PHAM). We are a fee-only organization offering a range of financial services to high net worth individuals. PHAM currently manages over \$1.4 billion in assets. Our offices are located in Stamford, Connecticut; Fort Lauderdale, Florida; Atlanta, Georgia; Portland, Oregon; and Austin, Texas. Our clients live across the U.S. and abroad.

Qualifications

- BS, BBA w/GPA of 3.3+
- Accounting, finance and/or economics majors encouraged.
- CFP® candidates encouraged.
- Entrepreneurial spirit
- Interest in helping people
- Fascination with money management (essential)
- Strong verbal and written skills

Starting Salary

\$75K +, depending on experience, plus bonus and profit sharing (total package \$80K-\$90K +)

Position Description

This position in our Fort Lauderdale office offers exposure to all areas of financial planning and investment management for high net worth individuals. Projects will include tax preparation and planning, financial and estate planning, research, reviewing financial statements, applying business and economics skills, and communicating with clients. Investment experiences at Palisades Hudson Asset Management (our registered investment advisor affiliate) include hands-on exposure to the asset management business, including conducting investment research, generating and creating monthly performance reports, and assisting clients. Additional opportunities involve participation in projects key to the growth of the organization.

Contact Information

Ms. Melissa DiNapoli
Recruiting Manager
300 First Stamford Place, Suite 215 Stamford, CT 06902
914-723-5000
Email: melissa@palisadeshudson.com