LuesinkStenstrom Financial

INDEPENDENT | FEE ONLY

In search of Experienced Financial Planner/Entrepreneur to join our team at Luesink Stenstrom Financial (LSF)

Have you thought about becoming independent or maybe you have your own clients and would enjoy working within a team environment.

Are you an entrepreneurial and seasoned Financial Planner and/or Investment Manager seeking a new and impactful opportunity?

Ready to seize control of your career and advance it within a thriving independent RIA firm?

Join our team to grow and flourish at LSF.

Who We Are: Luesink Stenstrom Financial (LSF) is a growing Financial Planning and Investment Management firm, with a focus on our clients' personal aspirations. Our purpose is to help our clients get through life with its multiple transitions with ease and financial clarity, while creating a secure financial life.

Our Vision: We believe that client engagement is key to having a long-term relationship with clients. Financial education creates clarity and empowerment and leads to financial freedom and peace of mind. We're committed to help clients shape their life in line with their values, one customized financial life plan at a time.

Our Approach: At LSF, our journey of evolution and improvement never ceases.

- We have a caring and considerate approach to clients, employees, vendors and other professionals.
- We recognize that there are 2 sides to money, the technical and the personal side. The technical encompasses financial planning services and investment management; the personal side of money drives the decisions that clients make. Both are equally important.
- To increase our expertise and tools for helping clients make good financial decisions, we affiliated with the Sudden Money Institute and became Financial Transitionists. This positions us as leaders in guiding clients through significant financial milestones.

Why LSF: Our motivation comes from the satisfaction helping our clients achieve financial freedom and deep joy in their lives. We believe in mutual respect and work-life balance in our firm.

As we seek an exceptional individual to join our ranks, here's what we value:

Qualities We Seek:

- To be client focused and to have the highest ethical standards.
- Must have the CFP® designation and at least 10 years experience.
- Is a practicing financial planner with an established client portfolio, but also a Team Player
- A preference for the independent landscape of an IRA firm
- Entrepreneurial skills and an aspiration to step up to a leadership role in the management of the firm
- Affinity with Financial Transition Planning
- A strategic Thinking Partner, collaborating in refining best practices and firm development.
- A plus would be:
    - Proficiency in managing client portfolios yourself (CFA, CIMA)
    - Proven engagement in Pro Bono Financial planning
    - Conveniently located in the Eastern time zone.
    - Enthusiasm for Global Financial Planning

What We Offer:

- A well-structured establishment equipped with streamlined protocols for Financial Planning, Investment Management, Financial Transitions Planning, and Global Financial Planning.
- Ample avenues for growing your client base, bolstered by our dynamic marketing strategies.
- Enhanced service capabilities through our cutting-edge technology solutions and systematic investment management.
- A trajectory towards personal and professional excellence, facilitated by our support, extensive experience, and large professional network.
- An atmosphere receptive to new ideas and dedicated to enriching client experiences.
- A completely virtual operational environment.
- An esteemed New York office address, serving as a work haven or client meeting point.

If your passion of serving clients and shaping your career aligns with our firm’s mission, we’d like to speak to you. Share information about you and your interests at info@luesinkstenstrom.com and we will respond to you within 2 weeks.