LuesinkStenstrom Financial
INDEPENDENT | FEE ONLY

Experienced Planner:

Are you looking to work independently and have more life-work balance?
Join our growing and expanding business located in NYC, but with global clients.

LSF is a Wealth Management firm with the mission to help clients lead their best lives and get through life transitions with more ease and clarity and specifically help them with Cross-border issues.

- We follow a holistic life planning approach (being trained by the Kinder Institute) and as Financial Transitionists (trained by the Sudden Money Institute) we use specific expertise and tools for helping clients make good financial decisions in transitions.
- We are continuously learning in all aspects of our business and trying to improve our clients' experiences and we are open to new ideas.
- We have a caring and considerate approach to clients, employees, vendors and other professionals. We believe in mutual respect and work-life balance in our firm.
- Our motivation comes from the satisfaction of helping our clients achieve financial freedom and deep joy in their lives.

The person who joins our team needs
− To be client-focused and to have the highest ethical standards
− Must have the CFP® designation and at least 10 years of experience
− Is a practicing financial planner, works with their own clients, but is also a Team Player
− Wants to work in an independent RIA firm
− Has entrepreneurial skills and wants to grow into a management position
− Interest in Financial Transition Planning
− Be a thinking partner and collaborator in best client practices and further development of the firm
− A plus would be:
o a background in managing client portfolios yourself (CFA, CIMA)
o to have practiced Pro Bono Financial planning
o to be in the Eastern time zone
o Interest in global financial planning

We offer:
- A great-functioning firm with processes and protocols for Financial Planning, Investment Management, Financial Transitions Planning and Global Financial Planning
- The ability to grow your client base with developed marketing strategies
- The ability to better serve your clients through our innovative financial planning practices and our systemized investment management
- To develop into your best professional self through our support, our vast experience and our large network of other professionals.
- An environment open to new ideas and continuously trying to improve clients' experiences
- A completely virtual working environment
- An office address in New York with a place to work or to meet clients