Wealth Planner II, Wealth Management – Detroit, MI (Please email resumes to eedavis@comerica.com)

The Wealth Planner is responsible for assisting the Senior Wealth Planner with developing comprehensive, customized financial plans for high-net worth individuals by compiling and analyzing data. Comerica Bank uses WealthTec and Sungard as its primary planning tools. MS Word is used for documentation.

Position Responsibilities:
1. Provide financial strategies and solutions through the creation of sophisticated wealth plans for high net worth individuals.
2. Responsible for the preparation of the written document which accompanies financial data, detailing recommendations and strategies for implementation.
3. Possess a knowledge and understanding of estate and financial planning strategies including wealth transfer techniques, life insurance, and investment products.
4. Knowledge of individual and pass-through entities and taxation.
5. Responsible for reviewing and understanding confidential client data, including, but not limited to, tax returns, investment statements, insurance policies and estate planning documents.
6. Remain current with respect to the ever-changing income and estate tax laws.
7. Provide technical assistance and support to Senior Wealth Planners.
8. Assist with the development and creation of new and innovative wealth planning strategies.
9. Responsible for maintaining updates for primary wealth planning software tool.
10. CPA or CFP desired.

Travel
Some local travel may be required of this position.

Relocation
Relocation is not available for this position.

Qualifications
- Bachelor's degree from an accredited university in accounting, business, finance or economics
- 3 years of experience in a national, regional or local public accounting firm, regional law firm, or a financial services company doing Financial Planning, Tax, Legal or related work
- 3 years utilizing financial planning software and spreadsheet analysis

Emily Davis | First Level Officer | Talent Acquisition Consultant
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