CORDA
TOGETHER WE'RE INVESTED

Company Overview

CORDA Investment Management, LLC is a client-centered wealth management firm serving high-net-worth individuals and families. We bring together investment management, financial planning, and tax strategy in one integrated, proactive approach.

Registered with the SEC under the Investment Advisers Act of 1940, CORDA upholds the highest standards of integrity and fiduciary responsibility.

At CORDA, our team shares a common purpose: helping clients navigate complexity, build confidence in their financial future, and leave a meaningful legacy. We are a close-knit, collaborative team. We support each other and welcome new ideas, while staying focused on the clients we serve. If our work resonates with you, we'd love to connect!

Financial Planner

We are seeking an experienced Financial Planner to lead client engagement throughout the financial planning process. In this role, you will guide new clients from onboarding through plan development and provide ongoing planning as their needs evolve over time. This is a client-facing position focused on building long-term relationships and delivering thoughtful, personalized advice.

The ideal candidate brings a comprehensive understanding of financial planning, including tax considerations, investments, insurance such as life, disability, long-term care, and property and casualty, as well as cash flow and private investments or real estate. Experience working with clients approaching or in retirement is essential.

This role is well suited for someone who is self-driven, intellectually curious, and committed to delivering a high level of care. You take ownership of the client experience, proactively identify opportunities to add value, and approach planning with both technical expertise and empathy. You are a strong problem solver who listens carefully, understands each client's unique situation, and helps guide them at a pace aligned with their goals and expectations.

Location (Hybrid, 3 days in office): Austin

Position Type: Full-Time

Essential Duties & Responsibilities

- Partner with the planning team to analyze client situations, conduct research, and develop and implement financial planning recommendations
- Collaborate with clients' external advisors, including attorneys, CPAs, and other professionals, to ensure coordinated planning strategies
- Deliver financial advice to clients with confidence and clarity through virtual and phone meetings, demonstrating strong verbal and non-verbal communication skills
- Act as an accountability partner to advisors, helping ensure client plans are executed and goals are tracked over time
- Provide insights on industry trends, best practices, and opportunities to enhance the firm's planning capabilities and service offerings
- Maintain the highest standards of ethics, professionalism, and client confidentiality
- Prepare, coordinate, and follow through on client communications for both prospective and existing clients
- Contribute to the development and improvement of internal processes, workflows, and client-facing materials
- Maintain accurate and up-to-date client records and activity tracking within Salesforce

Education & Experience

- Bachelor's degree required (preferred fields: Business, Accounting, Finance, Economics)
- 5+ years of experience in financial services, including 3+ years developing and presenting comprehensive financial plans
- CFP®, RICP®, or equivalent designation (or progress toward certification)
- Strong foundation in personal financial planning, including wealth management, risk management, and retirement income strategies
- Experience working with pre-retirees and retirees; exposure to multi-generational planning is a plus
- Experience with financial planning tools such as eMoney or MoneyGuidePro
- Familiarity with CRM and advisor technology platforms (e.g., Salesforce)
- Experience with tools such as FP Alpha or SSAnalyzer is a plus
- Experience working with custodians such as Charles Schwab preferred
- Advanced proficiency in Microsoft Office (Excel, PowerPoint, Word)