Corrigan Financial, Inc. (CFI) is a nationally recognized financial advisory firm managing over $950 million in client investment assets. Formed in 1989 for the purpose of providing comprehensive financial advisory services to high-net worth families and individuals, CFI focuses on understanding the unique needs of our clients and providing them with customized financial planning and investment strategies that help them attain their overall financial and personal goals.

Investment Advisor

CFI seeks a motivated and qualified individual for the position of Investment Advisor. The individual selected for this opportunity will provide a broad range of technical and client management support to all client and staff members.

The Investment Advisor selected will be a key member of the Investment Team whose responsibilities include but are not limited to:

- Listening to client needs, evaluate investment options and educate client on investment decisions.
- Meeting with clients periodically to review investment performance and asset allocation
- Communicating and interfacing with financial planners and custodians on behalf of client(s), and initiating proactive follow-through on all tasks.
- Maintaining and updating databases using multiple technologies.
- Initiating trading of securities.
- The individual will be expected to obtain the Series 65 within six months of hire.

Qualifications:

- A degree in finance or economics is preferred.
- One to three years of financial services experience is preferred.
- The individual must have attention to detail, self-initiated follow-through, outstanding time management and organizational skills.
- The individual must have strong quantitative and qualitative abilities, and excellent written and oral communication skills.
- The individual must have proficiency in Microsoft Office applications, and proven ability to learn other software and technology.

Financial Planner

CFI seeks financial planners whose interests align with our own in serving and developing long-term relationships with families, individuals and corporations. Qualified candidates for this position must be energetic professionals whose interest lies in working with CFI partners to provide financial planning services to our clients and their families. Initial duties may include all aspects of financial planning, client communications, development of planning systems and coordination with existing staff members. The associate selected will be a key part of a team of associates whose responsibilities include but are not limited to:

- Development of financial planning and investment strategies
- Developing and maintaining financial plans and modeling spreadsheets
- Supporting partners and associates

Qualifications:

- CPA designation is required.
- A degree in accounting or finance is required.
- Three to ten years of related professional experience is preferred.
- The individual must have strong analytical, problem-solving skills and pay close attention to details.
- The individual must have excellent time management skills, have the ability to multitask and have superior organizational skills.
- The individual must have outstanding written and oral communication skills.
- The individual must have a strong interest in financial planning with a desire to grow professionally within the firm.

CFI recognizes that talented, knowledgeable and experienced individuals are the core elements that makes us one of the premier fee-only financial advisory firms in the country.

Our staff of 28 includes CPAs, PFSs, CFP®s, MSTs, and MBAs, all focused on client service.

Contact Information:

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