

Financial Planning Careers

Industry Growth

The United States Bureau of Labor Statistics projects a faster than average (18-26%) growth in financial planning/advising jobs from 2004-2014.

*Source: O*NET Online*

The output of US securities, commodity contracts, and investments, an indicator for financial planners and investment advisers, is forecast to grow at an annual compounded rate of 4.2 percent between 2007 and 2012.

Source: CareerBeam Industry Database: First Research Industry Profiles- Financial Planners and Investment Advisors

Sample Job Titles

Financial Planner	Certified Financial Planner (CFP)
Financial Advisor	Financial Counselor
Personal Financial Advisor	Financial Consultant
Investment Advisor	Private Wealth Manager

*Source: O*NET Online*

Sample Work Environments/Employers

Financial Services Firms	Independent Practices	Banks
Insurance Companies	Brokerage Firms	Corporate Benefits/Pension Depts.

Source: Certified Financial Planner Board of Standards; Financial Planning Association

Salary Ranges

	National Low	National High	SF Low	SF High
Personal Financial Advisors	\$32,300	\$145,600+	\$35,900	\$145,600+

Source: America's Career InfoNet

Resume Keywords

Financial Research	Financial Analysis	Estate Planning
Investment Management	Risk Management	Financial Statements
Income Tax Planning	Cash Management	Charitable Planning
Business Planning	Investment Strategy	Tax Law

Source: Financial Planning Association

Key Skills and Characteristics

Quantitative Analysis	Written Communication Skills	Integrity
Interpersonal Skills	Customer Service	Independence
Verbal Communication Skills	Analytical Thinking	Dependability
Attention to Detail	Active Listening	Time Management

*Source: O*Net Online*

Additional Resources

GGU Library:

Careers for Financial Mavens and Other Money Movers, Marjorie Eberts & Margaret Gisler (Ebrary)

GGUCareers.com:

CareerBeam Industry Database: First Research Industry Profile- Financial Planners & Investment Advisors

Vault Career Guide to Private Wealth Management

On the Web:

O*NET Online <http://online.onetcenter.org/>

America's Career InfoNet www.careerinfonet.org

Financial Planning Association

Certified Financial Planner Board of Standards