To apply for this position, please visit the Synovus Careers website at [www.Synovus.com](http://www.Synovus.com).

Original Posting date: 03/05/13
Job Title: Financial Planning Analyst
Area of Interest: Other Financial Services
Requisition Number: 5120
Company: Synovus Securities, Inc.
Location: Creative Financial Group
City: Atlanta
State: Georgia
Country: U.S.
Full-Time/Part-Time: Full Time
Shift: First
Minimum Requirements:
- Required Education: Bachelor's Degree in Finance, Economics, Business Administration or related discipline
- Required Experience: 3 years job related experience in financial services
- Required Knowledge, Skills, & Abilities:
  - Good analysis skills
  - Demonstrated ability to routinely deal with confidential information and materials
  - Excellent interpersonal and communication skills
  - Proficient in Excel
- Required Certification(s): Series 7 and 63 preferred

Additional Job information: ---

Job Description:
Job Summary:
Works with Financial Planner to understand clients' objectives and goals. Prepare, enter and analyze data provided by clients in order to prepare new financial plans, updates for meetings or responses to client requests. Analyses may involve retirement, estate, insurance/survivor, education, tax and retirement projections or portfolio planning.

Job Duties and Responsibilities:
- Obtains data from client in order to enter data into database. Analyzes data to prepare new financial plans, updates for meetings, or responses to client requests.
- Work with Financial Planner to understand client objectives and goals
- Communicates with clients to obtain sufficient information to perform data analysis.
- Explains financial plan documents to clients in the absence of the financial planner.
- May execute trades at the request of financial planner, or may serve as backup asset management traders during periods of absence.
- Follows all company policies and procedures, applicable laws and regulations
- Provides assistance with the training of new financial planning analysts.
- Perform other related duties as assigned.

The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job.