

WORK VAPOR

Job Link: <https://workvapor.com/jobs/financial-planner-232656/>

HIRING ORGANIZATION

Lucas Adams Financial Services

EMPLOYMENT TYPE

Part-time

JOB LOCATION

? Remote work from: United States

DATE POSTED

? 10/26/2026

FINANCIAL PLANNER

BASE SALARY

USD 50000 - USD 150000

DESCRIPTION

Job Role: Financial Planner

Company: Lucas Adams Financial Services

Location: United States, Puerto Rico or Canada

Work Mode: Remote

Advertised Pay Range: \$50,000–\$150,000 per year

Employment Type: Full-time or Part-time

Work Arrangement: 1099 Independent Contractor

Compensation: Commission-based

Expected Hours: 10–40 hours per week

Education: No degree required

Age Requirement: 18 years or older

Application Email: lucaskadams76@gmail.com

About the Company

Lucas Adams Financial Services provides financial planning services to clients. The firm focuses on helping people understand and achieve their financial goals.

The company is looking for a motivated Financial Planner. This position offers remote work and opportunities for professional growth.

Job Overview

As a Financial Planner, you will help clients plan their finances. You will learn about their needs and recommend suitable financial strategies.

You will prepare reports and maintain client relationships. You will also follow financial trends and industry updates.

Key Responsibilities

1. Financial Planning

- Provide financial planning services to clients.
- Understand each client's financial needs and goals.
- Prepare financial reports and recommendations.
- Develop strategies based on client requirements.
- Help clients understand their financial options.

2. Client Relationship Management

- Build and maintain strong client relationships.
- Communicate financial information in simple language.
- Respond to client questions and requests.
- Follow up on outstanding tasks.
- Complete client requests accurately and on time.

3. Teamwork and Industry Knowledge

- Work with team members to support clients.
- Stay updated on financial trends and market conditions.
- Follow relevant regulatory changes.
- Manage multiple client priorities.
- Maintain organized records and meet deadlines.

Required Qualifications

- Must be at least 18 years old.
- Must reside in the United States, Puerto Rico or Canada.
- Strong interest in financial planning.
- Good written and verbal communication skills.
- Ability to explain complex information clearly.
- Strong organizational and time-management skills.
- Ability to manage several tasks at once.
- Good attention to detail.
- Ability to work independently and with a team.
- A proactive and results-focused mindset.

Education and Experience

A college degree is not required. The company values practical skills and a willingness to learn.

Candidates should be comfortable working with clients and discussing financial goals. Relevant financial services experience may be useful.

Salary and Compensation

- Advertised annual earnings range: \$50,000–\$150,000.
- Compensation is fully commission-based.
- The position uses a 1099 independent contractor arrangement.
- Earnings depend on performance and commissions.

- No guaranteed salary is stated in the listing.
- Expected working hours are 10–40 hours per week.

Benefits and Work Flexibility

- Remote work.
- Flexible schedule.
- Full-time and part-time options.
- Professional growth opportunities.
- Supportive and collaborative team environment.
- No degree requirement.

How to Apply

Apply through the online listing or email your resume to the company.

Application Email: lucaskadams76@gmail.com

Apply Online: Apply Now – Financial Planner