

**Company:** AnchorPoint Financial

**Position:** Para-Planner

## **Overview**

AnchorPoint Financial is a well-established financial planning firm located in Cabot, Arkansas. We provide in-depth financial planning and wealth management to our clientele which includes business owners, professionals, and families. Our team is cohesive, collegial, and professional. Together, we focus on providing our clients with a consistent high level of service.

## **Key Areas of Responsibilities**

- Internal planning support for our Advisors
- Prepare and update client financial plans
- Prepare various reports and documents for meetings
- Assist Advisors with data collection process
- Assist Advisors with client follow-up
- Investment Portfolio oversight support
- Financial planning research projects
- Coordinate with Advisors and team in preparing client reviews
- Prepare for review of insurance and 529 plans
- Collaborate with team regarding client service issues

## **Requirements for success**

- Bachelor's Degree & 2+ years of experience in financial services
- Great interest in financial planning and desire CFP designation
- Very proficient with technology, MS Office Excel
- Effective verbal and written communication skills
- Commitment to exceptional client experience
- Work well with others and foster team collaboration
- Securities licensing is a plus

## **Compensation**

- Starting salary range of \$37,500 to \$50,000
- Excellent Benefits

Please send resume to: [angel@anchorpointadvisors.com](mailto:angel@anchorpointadvisors.com)