Paraplanner with Financial Planner Career Track – Colorado Springs, CO

This position is the entry level professional position, with the intention of becoming a financial planner in the coming years.

Duties will include:
- Initially
  - Learning and performing operational and paraplanning tasks integral to preparation of investment reports, investment research, research on tax issues, general financial planning, and miscellaneous client inquiries
  - Preparation for client appointments
  - Follow up from client appointments
  - Preparing client forms for investment accounts
  - Learning the firm’s software, including Redtail Client Record Management system, Money Tree Silver, TPX, and Tax Tools
  - After initial 90 days, interacting with clients regarding operational questions
- After the initial tasks are mastered (six to twelve months)
  - Observing and taking notes in client appointments
  - Preparing draft recommendations for clients to be reviewed by and finalized with the financial planner
  - Attending networking events with a planner
  - Attending professional conferences
- After above referenced duties are mastered (additional six to twelve months)
  - Participating in meetings with clients

Skills and Education Required:
- Professional demeanor and dress
- Positive attitude, team player, inquiring mind
- Attention to detail, good organizational system, ability to follow through
- Comfort with technology, including knowledge of Microsoft Word and Excel
- Bachelor’s or Master’s degree in Personal Financial Planning
- Completed all CFP certification courses

Background check and KOLBE test required. Passing the CFP exam required in the first 18 months of employment. Must also subsequent pass the Enrolled Agent examination.

Resumes with a cover email can be submitted to terri@itsnotjustmoney.com.