



## WEALTH DEVELOPMENT STRATEGIES LLC

### **Para-Planner/Specialist**

The Para-Planner position is either a licensed or an unlicensed position that serves as the expert on all technology tools needed in the practice. This includes E-money, Morningstar, Wealth View, Insurance Illustrations and any other software deemed by the advisor to be needed in the practice.

#### **Company Overview:**

Wealth Development Strategies LLC, whose history dates back to 1969, is a true reflection of Houston and its rich and diverse culture. At our firm, we utilize the cumulative experience and expertise of our advisors and staff to better serve our clients. We are committed to excellence and foster an innovative and creative planning environment in which our advisors deliver careful analysis, insightful recommendations and objective solutions.

#### **Roles/Duties**

- Creation of consultative and full fundamental plans
- Create managed account proposals
- Other duties as assigned
- Stay up to date and fully knowledgeable on all needed technology to fulfill position

#### **Production Expectation**

- Complete all design and communicate with the advisor on proofing and editing of plan
- Utilize Morningstar to assist the advisor in research and portfolio development

#### **Compensation**

- Salary: Negotiated with managing partner

#### **Quarterly Objectives**

- Efficiently and effectively handle 100% of all assigned case work
- Completion of all necessary plans and proposals done on time
- 100% competency in all software packages needed to fulfill position
- 100% attainment of service turnaround goals

#### **Annual Objectives**

- 100% efficiency in all software packages needed to fulfill position
- 100% of staff goals achieved
- Handled all duties effectively and efficiently
- Completion of all necessary plans and proposals done on time

