

# Financial Planning Associate (Paraplanner)

Silver Oak Advisory Group is a mature, boutique financial planning and investment advisory firm in downtown Portland, Oregon. We are seeking a paraplanner to assist our team practice, who will embrace our collaborative culture and support our mission of guiding clients to make informed financial decisions that help give them the best possible chance at reaching their life goals. Our client-centric values include acting with honesty and integrity, striving for constant improvement and providing quality service and client satisfaction.

## Qualifications

- Bachelor's degree with 3-5 years financial industry experience
- Experience with financial planning software MoneyGuide Pro or similar
- Experience with forms, processes and procedures at Schwab Institutional or similar
- Familiarity with investments, including concepts of portfolio design and diversification
- Basic understanding of comprehensive personal financial planning, including retirement planning, employee benefits, insurance, investment vehicles, asset allocation, estate planning, income tax and executive compensation
- Strong proficiency with Microsoft Excel and Word
- Professional communication skills, both written and verbal
- Detail-oriented, accurate, organized and able to set priorities in managing projects
- Ability to thrive in a collaborative, small-office environment
- Registered Paraplanner(SM), CFP®, or demonstrated progress toward the CFP® preferred

## Duties and Responsibilities

- Assist advisors with the organization of client information, periodic reporting and preparation of financial plans
- Support advisors in helping prepare for and follow up from client meetings
- Attend client meetings as needed, capturing notes, action items and takeaways
- Prepare necessary forms for client service
- Seek regular professional development opportunities

Salary depends on experience and will be based on a national average salary of \$50,000 to \$70,000 per year. After meeting eligibility requirements, other benefits include group health insurance plan (employer contributes toward premiums), life and disability insurance, 401(k) plan with profit share, subsidized parking or mass-transit pass. Paid vacation days include all stock market closures plus ten personal days.

Interested applicants should send their resumes with a cover letter via email to [hirepara@silveroak.net](mailto:hirepara@silveroak.net). Silver Oak Advisory Group is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. No phone calls or direct mail, please. No third parties.