

Paraplanner

Position Description

PARTNERSINWEALTH is seeking to dramatically accelerate growth and we are looking for a mission-focused Paraplanner who is driven by an unwavering desire for self-improvement and excellence. This is an outstanding opportunity for a highly motivated professional.

Responsibilities

Reporting to the VP-Client Services the Paraplanner will assist the **PERSONALCFO** and have the following responsibilities:

- Assist in preparation of financial plans for clients including analysis and recommendations in areas such as cash-flow, retirement, estate-planning, education-funding, stock options and risk management
- Manage pre-client meeting activities such as preparation of agendas, client-ready financial plan presentations, recommendations and client paperwork
- Manage post-client meeting tasks in a timely manner such as meeting notes, revisions to financial plans as needed and implementation of agreed to recommendations
- Evaluate clients current investments, assist in development of recommendations and presentation to clients, implement changes per clients Investment Policy Statements
- Follow-up with clients' other advisors and our collaboration partners as needed
- Demonstrate a high level of quality service to clients by maintaining a keen awareness of their comprehensive financial situation and responding promptly to their needs

Qualifications

Above all else, the successful candidate must believe in the core values of **PARTNERSINWEALTH** and be driven by our mission. Beyond that, we are seeking a candidate that has a selfless desire to lead people to a higher level of financial peace of mind.

The successful candidate will most likely have around 5 years of business experience in a small business environment with at least 3 years in the personal financial advisory field. Additional requirements are:

- Overall DNA — highly detailed and organized, constant desire to increase knowledge and ability, laser focus on meeting client needs in a team environment, building a spirit of cooperation and sharing knowledge and skills with others for the betterment of our clients
- People Skills – confidence interacting with older and knowledgeable high net worth clients and other stake holders. Ability to confidently present a new perspective or different opinion.
- Communication – ability to clearly and succinctly communicate both verbally and in writing
- Action Oriented — strong work ethic and looks for challenges; able to act and react as necessary, even if limited information is available; not afraid to make decisions
- Technology Acumen – innate ability to understand technology including cloud-based software. Working knowledge of ByAllAccounts, eMoney, TRX and Orion software a plus.
- Educational Background — four year undergraduate degree required preferably in financial planning; business, finance, economics, or related fields. Basic understanding of financial planning strategies for high net worth clients. Significant consideration will be given to candidates who are a Registered Paraplanner, CFP, CPA, ChFC or CLU. Series 6, 7, 63 or 65 is a plus.

To apply, please send resume and cover letter to jjj@partnersinwealth.com.

About Us

Founded in 2000, **PARTNERSINWEALTH**'s mission is to lead our clients to an enduring financial peace of mind.

PARTNERSINWEALTH is a highly regarded financial advisory firm serving clientele in the greater Houston, Texas area. We are in the wealth management business serving as a **PERSONALCFO** for financially successful families. We have a succession plan in place to ensure that we'll be here 50 years from now.

This is a special opportunity, unlike most in the financial services industry. First, **PARTNERSINWEALTH** is prepared to offer an attractive compensation package for employees who demonstrate hard work, leadership and passion for our mission. Second, you will be a member of a collaborative and supportive team of strong individuals, passionately working hard to grow a successful and multigenerational business.

For more information, please visit www.partnersinwealth.com