Financial Planning Job

Remote Paraplanner Contractor

Spire Outsourcing (www.spireoutsourcing.com) is a team of Certified Financial Planners (CFP®), based in Fort Worth, TX, who assist practicing financial professionals (FP) by analyzing their client data and constructing customized financial plans. SPIRE's product helps build stronger trust relationships for the FP and their clients through industry leading technology and effective communication. Therefore, **SPIRE seeks highly qualified Paraplanner Contractors to join their Team.** The Remote Paraplanner Contractor role is essential in assisting an FP to gain greater insight into the financial health and needs of their clients. As a student contractor, you will be paid to construct financial plans in eMoney on a per-plan basis for firms with Cambridge Investment Research, Inc., a Broker/Dealer, member FINRA/SIPC and Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. Students work remotely from their own computers using cloud-based technology and gain experience towards CFP® certification requirements while constructing actual client plans for financial professionals from around the country. Supervision of this process is completed by practicing financial planners at SPIRE.

Key Responsibilities (The main objective is to complete financial plans in eMoney within 2-4 weeks.)

- Mine client data for missing information.
- Ask questions to clarify a client's goals and financial position.
- Enter all client data and produce Retirement, Insurance, and Education models, among others, as appropriate.
- Research financial planning topics as needed.
- Use templates to write customized observations for client plans, succinctly discussing important items.
- Use templates to write general next steps for each plan.
- Produce completed financial plans up to, but excluding, specific client recommendations.
- Communicate with the SPIRE planning team about progress, questions, and any other relevant topics to ensure the timely and professional completion of each financial plan.

Qualifications

- Passionate about, and pursuing, a career in financial planning.
- Pursuing a degree in financial planning as a Junior or higher (including graduate students) with CFP® education course work. Exceptions can be made if there is enough experience. Retirement course completion is preferred.
- Ideal candidates have a prior internship or other experience.
- Knowledge of eMoney or experience in other financial planning software. Certification in eMoney is preferred.
- Exceptional time management skills.
- Exceptional interpersonal communication skills (written and oral).
- Great at problem solving and figuring things out through the utilization of multiple resources.
- An ability to educate others on financial plan results.
- Knowledge on how to research financial planning topics.
- Have a clear understanding of information confidentiality and agree to protect client information.

Benefits

Paid $150/plan | Work Remotely | eMoney Experience | One-on-One Coaching | Earn CFP® Experience Hours

How to Apply & Interview Process:

Applicants are asked to send their resume to Eric Sawyer, CFP®, at esawyer@spireoutsourcing.com.

Applicants will then be selected for a phone or Zoom interview.

Those chosen will be hired as non-producing admins with Cambridge Investment Research to facilitate a background check and regulatory supervision.