



Virtual Paraplanner

Founded in 2004, we are different type of investment firm that has a passion for helping our clients achieve their financial goals during every kind of market cycle. Our interests are aligned with our clients. We provide comprehensive financial planning, investment management and real estate investment services. Our mission and vision extends to the people we hire as we want them to succeed in their role and provide opportunities for advancement.

Who we are looking for

Virtual Paraplanner to add to our team of hard-working, dedicated and fun individuals. You will be involved in all aspects of the financial planning process, including insurance, investments, income tax, retirement, and estate planning. Are passionate about Financial Planning? Are you willing to deliver awesome client experiences? If you have the drive and self-motivation to become a great asset to our team we would like to hear from you!

Our Promise to You

A-players: Life is too short to work with people who aren't rockstars

Integrity: Helping people with their money requires incredible trust. We do not take this lightly.

Everyone Has a Voice: Great ideas can come from anywhere. We will always listen.

Continuous Improvement: We commit to always asking how we can be better, in everything that we do.

Job Duties

- Working directly with clients through email, phone and videoconference.
- Prepare financial plan reports, recommendations and other analysis using eMoney Financial Planning software
- Present financial plan recommendations to clients
- Assist in onboarding clients on eMoney.
- Become proficient in using Morningstar Office, Fidelity & TD Ameritrade Institutional custodial platform and Redtail CRM
- Assist senior advisor in scheduling financial planning reviews with clients.
- Follow workflows and other processes in preparation for client reviews.
- Problem solving any back-office issues and resolving in a timely manner

Skills/Requirements

- Applicants must have a CFP designation and/or completed financial planning course work and working towards a CFP designation.
- Must have experience using eMoney financial planning software
- Be trustworthy, ethical, hard-working and professional
- Extreme attention to detail with proven accuracy. Ability to work with confidential data.
- Participate in weekly video team conference calls.
- Ability to successfully communicate with clients and members of our team.
- Excellent presentation/facilitation, organizational, analytical, and written/oral communication skills
- Be a self-starter, pro-active, resourceful.
- Proficiency in MS Office Suite

Pay Commensurate with experience, this will be a 1099 position.

Hours 15-25

Location Virtual

How to Apply

1. Please send your cover letter and resume to team@usaam.com
2. Subject Line type in Position you are applying for "Virtual Paraplanner"