ARBOR
WEALTH MANAGEMENT, LLC

Arbor Wealth Management, LLC, a small, family-owned and operated fiduciary, fee-only investment advisory firm in Miramar Beach, FL, seeks to hire a full-time paraplanner in January of 2018. Miramar Beach is located just east of beautiful Destin, FL. Its white sand beaches and Caribbean clear waters make it the second most popular drive-to destination in the Southeast (behind Disney World). Quality of life is outstanding and natural beauty is unparalleled.

Margaret R. McDowell, ChFC®, AIF®, our firm principal, founded the first fee-only R.I.A. in the Destin area in 2000. Ms. McDowell's "*Arbor Outlook*" syndicated economic column is featured in 24 newspapers in three states and read weekly by over a million people. Firm has won and has been nominated for several awards and is highly credentialed, featuring two CFP®s, AIF®'s, one of whom is also an attorney who reviews estate planning documents. Firm works with several CPA's and attempts to provide in-house or by referral the total array of financial services.

Position offers opportunity for advancement in responsibility and salary. Candidate must combine investment and financial planning knowledge and technology acumen with excellent people skills and high teammate compatibility quotient. Strong work ethic and commitment to team success is extremely important. As a fee-only firm, we sell no financial products, but we are required to sell ourselves and our services to clients and potential clients each day, as is every competitive investment advisory firm. Candidate must embrace and enjoy challenging, dynamic environment. Please email resume and application letter (photo optional) to Paul McDowell, CFO, at pmcdowell@arborwealth.net. Team will conduct phone interviews and then invite top candidates to interview in person.

<u>Job Responsibilities</u>

- Complete in-depth financial plans for new and current clients (i.e. retirement projections, college funding, estate planning) using financial planning software
- Contact clients to update information for financial plans and deliver financial plan reports to clients during investment team portfolio reviews
- Perform daily maintenance of client database on firm's reporting software, PortfolioCenter. Perform monthly fee billing function.
- Prepare portfolio performance reports prior to client reviews and on an ad hoc basis
- Develop and implement program for reaching out to next generation (children and grandchildren of larger clients)
- Participate in investment committee meetings and conduct investment research as requested
- Perform any other duties as directed

<u>Desired Skills & Experience</u>

- Must have or be working on a Certified Financial Planner designation. Must also pass the Series 65 Exam, but if you pass the CFP, Florida will waive Series 65 Exam requirement.
- Possess a good understanding of and interest in financial markets
- Ability to communicate well, both verbally and in writing

- Strong work ethic is vital and must enjoy challenging, dynamic environment
- Practical experience utilizing some form of financial planning software and experience in developing financial plans using that software is extremely important
- Solid grasp of tax issues and how they impact clients is a bonus and familiarity with various forms of group retirement plans is a plus
- Be able to work independently and as part of a team
- Ability to manage competing priorities in a timely fashion
- Strong attention to detail and systematic follow-through with prospects and clients
- Ability to communicate information in a clear, concise, and professional manner

Qualifications:

- Bachelor’s degree
- Enthusiasm and interest in financial planning and portfolio management
- Solid understanding of firm goals for client portfolios for various types of clients. Understand firm philosophy on generating income through investments for clients who desire it.
- Experience and comfortability with financial planning software is vital to success and ability to learn PortfolioCenter software is extremely important
- Strong interpersonal skills and attention to detail, as well as organizational and time management skills
- Able to perform multiple tasks efficiently and accurately
- Exceptional phone and client service skills, positive and upbeat attitude
- Dedicated to continuing education
- Interest in networking and developing relationships with other professionals in the community

Benefits:

- Salary with opportunity for bonuses
- Career track with opportunities for advancement
- Retirement plan with profit sharing component
- Paid holidays and vacation
- Mentorship and learning opportunities