Clifton Capital Partners, Inc., a Fort Worth-based financial planning/investment advisory serving wealthy clientele is seeking a paraplanner. We hire based on 1) your proven work ethic 2) your powerful brain, focused on helping solve our client's financial challenges, 3) your attention to detail and unwillingness to accept the spreadsheet's result without validating that data, and 4) your experience in financial services or a closely related field such as law or accounting. If you are ready to join a dynamic Texas-based firm and learn firsthand how to advise successful clients by serving day-to-day with one of the industry's best practitioners, please submit your resume' and cover letter.

Your responsibilities will include:

- Collecting and validating data from clients.
- Entering client data into our industry-leading financial planning systems.
- Assist with ongoing portfolio monitoring and evaluation.
- Assist with evaluating a client's investment sector exposure, liquidity percentage, margin reserve, etc.
- Maintaining the accuracy of client data in our financial planning systems, CRM, and file storage systems.

Responsibilities after further training and appropriate licensure:

- Implement portfolio rebalancing and trading using our state of the art trading platform.
- Provide advice to clients on routine financial matters.
- Become a lead advisor, taking primary responsibility for existing small and mid-level clients.
- Assist in preparation of proposals for major new-client opportunities.

Skills you can develop that would make you an exceptional team member:

- Develop the ability to complete a preliminary evaluation of investment instruments made available to us through our broker/dealer relationship. Determine if these instruments are appropriate for our clients.
- Develop the ability to complete account applications for specialty products such as margin agreements, option trading agreements, variable or fixed-indexed annuities, private placement and alternative investments. Note that not all our clients have these instruments, and no client has all of them. We use these products were appropriate, though, and place a high value on accuracy in document preparation.

We will assist you in completing the requirements for FINRA licensure, compliance knowledge, and training, as well as the pursuit of your Certified Financial Planner ™ Practitioner designation.

Qualifications:

We give preference to candidates with the following characteristics or experience.

- Bachelor's degree or higher in a related field.
- Experience working in a wealth management or investment advisory firm.
- Experience in public accounting or professional services firm.
- Knowledge of life insurance products, and annuities.
- FINRA licensing.
- State life insurance licensing.
- Experience with e-Money Advisor technology platform, or Fidelity's WealthPort Wrap program.

We are seeking candidates who have an exceptional eye for detail and accuracy, and who can anticipate a problem that might disappoint a client or make us unable to fulfill a service commitment in the time promised, and suggest corrective action. Longer-term employees receive industry training and career development, excellent compensation, and gain the knowledge of how to provide effective, customized financial advice and guidance to wealthy clients. Please submit a resume' and cover letter to info@cliftoncapital.com.