**Paraplanner Position:**

**Ready to invest in your future with a team of people who care about your success and building a positive culture? Want to take your skills in people connectivity and ability to be accurate, detailed, and knowledgeable to the next level using our proven training processes?**

We are BlueCrest Financial Alliances and we are looking for a para planner and CFP® candidate who can deliver an exceptional planning experience for all clients. This is a great entry level / steppingstone role to get started in the financial services industry.

You will be working directly with our clients’ trusted advisor in areas including investments, protection, cash flow, savings, and debt management. IE – making a difference for families and people who are building their future. You will be an integral part of making this happen.

We deliver on our commitments and need people who can do the same. Our goal will be to ensure clients make wise and profitable decisions to meet their financial goals.

As a para planner we need an effective communicator with experience in financial planning and business development. If you’re analytical, meticulous, customer-oriented, and looking for career growth we would like to meet you.

This role is excellent for somebody with 1-5 years of experience wanting to gain a ton of knowledge and experience very rapidly, while being surrounded by people who will go out of their way to ensure the candidate accomplishes their personal goals in this business.

**Job brief:**

**Responsibilities**

* Build strong relationships to develop and retain existing clients
* Communicate with financial advisor on strategies that could be viable
* Develop sound plans and budgets for clients
* Analyze clients’ financial statuses (e.g. income, expenses, and liabilities)
* Examine and suggest financial opportunities (e.g. insurance plans, investments)
* Customize and communicate financial plans according to clients’ changing needs. IE – family is growing and education expenses
* Continuously seek and maintain knowledge base of regulations, best practices, and financial products
* Review and modify systems / practices to enhance the financial planning experience

**Requirements**

* Experience in sales or customer service is a positive but not required
* Ability to connect and clearly communicate with people, clearly share ideas and financial plans
* Attention to detail and basic math skills
* Proficiency in MS Office and ability to upkeep CRM systems
* Valid professional license (e.g. Series 7 & 66)
* BSc/BA in accounting, finance, business administration or relevant field; professional certification (e.g. CFP) is a plus
* Experience with financial planning software
* eMoney, RightCapital, and MoneyGuide Elite experience preferred
* Excellent phone and personal communication skill

**Please submit resume to: catherinepatrick2@bluecrestwm.com**