



Para Planner / Full-Time / Financial Planning & Investment Firm

Job Summary

Financial planning firm seeking a graduate of the Financial Planning department, preferably with a master's degree.

Full-time (8-5, Monday – Wednesday, and Friday 8-4). Located in downtown Fort Worth, TX; Upper-West Side

Seniority level - Mid-level

Job function – Administrative financial planning

Industries: Financial Planning, Financial Services

Salary and Benefits

W2 Employee

\$50K - \$65K

Opportunity for advancement

Three-year apprenticeship path from Para-planner to Junior Advisor to Senior Advisor

Please send your resume to careers@strittmatterwealth.com to be considered for this position.

Responsibilities and Duties

- Open and close office
- Process in/outbound mail and answer phones
- Prepare account paperwork accurately (new account, distribution/contribution requests, etc.) and follow up with clients and sponsor companies as needed
- Prepare for client meetings and reviews, including the preparation of reports, proposals, and financial illustrations.
- Take thorough notes during new client meetings
- Use eMoney to enter client data, create scenarios and reports
- Complete client assumptions, asset recommendations and plan recommendation documents
- Maintain effective working relationships with clients by assisting with their requests and account actions to completion
- Maintain client records, CRM database, and compliance files
- Interface with team members, custodians, and insurance companies
- Other assignments, as needed

Qualifications and Skills

- Bachelor's degree in Financial Planning, Master's degree a plus
- Proficient in Microsoft Office & Windows (Word, Excel, Outlook) and with Adobe Acrobat
- Strong attention to detail with the ability to work independently while embracing team collaboration
- Highly organized
- Displays exemplary professional communication skills, verbal and written
- Must be professional, courteous, and dependable
- Excellent client service skills
- Ability to manage multiple projects at once with consistent follow-through Commitment to provide high-quality work both to internal and external partners
- Ability to meet deadlines
- Minimum 3 professional references required
- Process-driven and results-oriented
- Ability to work well in a fast-paced environment
- Background check required
- Ability to work legally in the United States

About Us

Strittmatter Wealth Management Group, LLC was established in 2007. We are located in downtown Fort Worth and work with high-net-worth clients to provide financial planning and investment management.