Paraplanner

North Texas Wealth Management

Responsibilities

* Provide administrative support to the CERTIFIED FINANCIAL PLANNER™ professionals and other office staff where needed
* Answer phones and discern client’s needs to appropriately address them or direct them to the relevant party
* Greet clients professionally.
* Arrange meetings with clients and prospective clients
* Interact with clients to process business, and for service requests, delivering a high level of service
* Update and maintain Salesforce CRM for client information, relationship management and marketing activities
* Manage scheduling and calendar events
* Data entry to financial plan to facilitate client on boarding and financial plan creation

Skills

* Bachelors degree or higher required
* Ability to be resourceful and independently find resolutions
* Ability to create a positive work environment and effectively function as a team player
* Attention to detail as well as organize, prioritize and handle multiple tasks
* Proficiency in MS Office and Salesforce CRM software
* Strong verbal and written communication skills

**About our company**

North Texas Wealth Management has consistently been in the Top 50 Advisors for LPL Financial (LPL Financial is one of the nation's leading financial services companies and a publicly traded company under ticker symbol LPLA.)

Our culture is team-oriented and has been described as “top of class” as we have a positive team environment with incentives, competitive benefits and industry leading technology.

Our CERTIFIED FINANCIAL PLANNER™ professionals create and implement customized financial plans for individuals through investment management, income strategies, and tax planning. Our clients benefit from our expertise in understanding their employer-provided 401(k) and pension plans and how to integrate them into an optimal distribution plan.