



## Southlake, Texas Paraplanner

**Jayla Blakemore**  
Recruiter

[jblakemore@newplannerrecruiting.com](mailto:jblakemore@newplannerrecruiting.com)

## INTERESTED?

Apply here:

<https://bit.ly/3jsnflg>



### NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing an independent RIA in Southlake, Texas that is seeking a Paraplanner to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



### INDEPENDENT RIA, TEAM-CENTRIC, \$300M AUM

Our client is a successful and growing fee-only firm, with a platform for unique, value-added financial planning focused on the best interest of their clients. They are a fast-growing boutique practice beginning its transition to the ensemble model; they are building the team that will help them continue to grow. This is the opportunity for you if you have a passion for financial planning and desire to improve the lives of the clients you serve.



### RESPONSIBILITIES WE'LL TRUST YOU WITH

Support the team's financial planners in efficiently operating the back office to provide high quality client service that focuses on financial advising, client relations, wealth management, investment strategy, and new client development. Prepare for and participate in client meetings. Create, develop, and edit client deliverables. Collect, organize, and analyze client information. Prepare and make recommendations for client financial plans and investments. Research issues for clients and take necessary action.



### QUALIFICATIONS

Bachelor's degree from an accredited university; major in financial planning, finance, business administration, economics or related field preferred. 0-2 years of financial planning experience. CFP designation or candidacy is strongly preferred. Excellent written and verbal communication skills. Strong interpersonal skills. Team player.



### THE PERKS

Competitive salary based on experience, plus bonus opportunities. 401(k) with match. Company profit sharing. Health insurance stipend. One on one training. Continued education allowance. Clear advisor growth track options. Coverage for CFP dues and FPA membership.