**Do you have an appreciation for entrepreneurs, a passion for Financial Planning and Wealth Management and desire making an impact in a growing organization?**

A Paraplanner is a **junior member of a financial planning team**. They are responsible for collating documents from clients and completing the baseline, non-customer-facing work for a financial planning session.

This is a unique opportunity to join a high growth team that focuses on doing what is right for our business owner clients through wealth planning. As a Paraplanner you will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity.

**The Opportunity**

* Provide daily support to the Planning Team, conducting financial planning research and assisting in the preparation of customized comprehensive financial plans and portfolios for clients
* Gather client data to determine clients’ current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop comprehensive financial plans
* Input client data and prepare preliminary financial planning recommendations and initial product solutions for clients, and in support of our business development efforts
* Prepare charts, graphs and other visual aids to be used in client presentations
* Understand the major financial planning components
* Coordinate client service needs with internal and external team members
* Memorialize client meetings and provide support to the overall client experience
* Manage the capacity of the planning team and conduct scheduling of client meetings and activities
* Stay current on products, services and regulations that could impact our clients

**Our ideal candidate will possess the following:**

* A foundational knowledge of key financial, investment and risk management concepts
* A passion to help clients achieve their goals
* Demonstrated analytical and problem-solving skills
* Exceptionally Strong attention to detail, and exceptional follow through
* Outstanding communication and relationship building skills
* Excellent project management skills with ability to prioritize and track multiple tasks
* Bachelor’s degree, preferably with a concentration in Business, Economics or Financial Planning
* Previous experience within a Financial Planning role including hands-on use of FINTECH software
* Financial planning: 1 year (Preferred)
* CFP (Preferred)
* FINRA License (Preferred)

Physical Setting:

* Office

Schedule:

* Monday to Friday

Work Remotely:

* No