**Financial Paraplanner**

North Texas Wealth Management

**Job Description**

We are seeking an entry level financial planner for our wealth management firm. The ideal candidate is one who is ready to launch and grow a career in financial planning. Such an individual will enjoy working in a team-oriented firm; will have involvement in all aspects of the business, learning and shaping the way we care for our clients; and will gain valuable experience for developing a financial planning career. This position will best suit someone that is eager to learn, has a passion for finance, is both personable and professional, and holds in high regards serving clients in a fiduciary capacity.

**Responsibilities**

This individual will provide administrative support to and assist the CERTIFIED FINANCIAL PLANNER™ as they meet with clients, set up their financial plan, implement proposed strategies and provide ongoing account reviews.

Primary Responsibilities (including, but not limited to):

* Manage scheduling and calendar events
* Organize and schedule appoints with prospects and clients
* Attend prospect and client meetings with the CFP™ and take detailed notes
* Assist in creating financial plans
* Assist with analysis, rebalancing, and administration of client investment portfolios
* Data entry to facilitate client on boarding and financial plan creation
* Provide support for processing client service needs, delivering a high level of service
* Assist with the creation and implementation of workflows and procedures to improve efficiency and enhance client experience.

**Qualifications**

Required:

* Excellent organizational skills, attention to detail, and the ability to prioritize
* Dedicated to customer service and ability to identify, meet and follow through with clients needs
* Excellent project management skills
* Ability to work individually and as part of a team
* Positive attitude
* Strong verbal and written communication skills
* Strong analytical skills
* Bachelors degree

Preferred:

* Experience dealing with clients
* Experience with Client Relationship Management tools
* Experience in the financial services industry
* Securities registrations (Series 7 and/or 66)

**About our company**

North Texas Wealth Management has consistently been in the Top 50 Advisors for LPL Financial (LPL Financial is one of the nations 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.

Interested applicants can send their resumes or question to Bridget Koenitzer at [bridget.koenitzer@gmail.com](mailto:bridget.koenitzer@gmail.com) or 214.755.1442.