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**Paraplanner**

**Position:** This is a full-time role in our firm reporting directly to the owners. For this role, it is preferred to live in the Amarillo, TX area and work-in person; however, remote work will be an option, if candidate has proven remote work experience. You will need to be available from 8:30-5:00 (CST) Monday-Friday.

**Mission:** The mission of the Paraplanner is to directly support the principal advisor by providing exceptional customer service to all clients in various forms in an ethical manner. They will have a planning mindset and understand general financial planning protocols and concepts. The paraplanner will coordinate client meetings on behalf of the advisor, which includes meeting preparation and follow up tasks. The paraplanner also ensures client and company data is maintained according to internal procedures and regulations. The paraplanner must have a professional appearance and demeanor that inspires confidence and trust.

The paraplanner will help facilitate efficient office operations and firm growth by fulfilling duties of the job and participating in process and systems improvement requests. They must comply with all rules, regulations and policies of Shane Hall Financial, any broker/dealer, and all State and Federal Securities Regulators. They must have effective time management skills, have the ability to multi-task in a dynamic environment while prioritizing independent tasks and meeting aggressive deadlines.

This position naturally lends itself to become a junior advisor role within our company for the right individual with a career advancement mindset.

**Responsibilities:** The Paraplanner will have the following primary responsibilities.

* Coordinate all client meetings and create meeting agendas.
* Client meeting follow up as directed by advisor.
* Generate financial plans for prospective clients.
* Update financial plans for existing clients.
* Must become proficient in financial planning software, risk assessment software and other software as approved by Shane Hall Financial.
* Assists the client service coordinator in responding to incoming service requests.
* Reaching out to clients on behalf of the advisor.
* Maintenance and input of client information into CRM software to keep current for sorting, reporting, scheduling, fee tracking and marketing purposes

**Proficiencies:** The ideal paraplanner candidate will possess these proficiencies:

**Quality Communications:** The paraplanner must be an excellent communicator, in both written and oral form. This includes proficiency in spelling, grammar, and punctuation. They must also be able to track communication (and be very responsive) across multiple channels without losing any details. Those channels could include in-person meetings, Slack messages, phone calls, and/or emails. Having high attention to detail is paramount in maintaining accuracy of client and systems data.

**High Level of Discretion:** Since our paraplanner will regularly work with confidential information, discretion and sensitivity regarding financial and client information is a must. They’ll need to be able to collaborate and communicate well with other team members, maintaining a can-do spirit and not complaining, making excuses, or gossiping.

**Affinity for Technology:** Our paraplanner will be technologically savvy and will not be intimidated by learning new technology. Proficiency in the following tech platforms is ideal: Microsoft Office Suite, Zoom, Slack, and Google Suite. Ability to quickly learn and embrace use of Redtail CRM and other financial planning software and tools as necessary.

**Requirements**

**Education**: Bachelor’s degree, preferred; however, a combination of coursework and work-related experience and licenses are eligible for consideration

**Experience**: Minimum of 2 years working in a securities related environment preferred.

**Licenses:** Series 6, 63 or 65 required, or within 90-120 days

**Physical**: Ability to bend, reach, and lift boxes and office supplies up to 30 lbs.

**Job Type**: Full Time, Salary

**To apply:** Please submit a current resume and cover letter detailing why you would be a good fit for the position to kim@shanehallfinancial.com