
**Role:** Paraplanner
**Job Type:** Full-time, 40 hours per week
**Location:** Weatherford. TX
**Benefits:** Employer-paid health insurance, 401(k) with match, employer HSA contributions, additional benefits/perks

**Summary:**

Highly energized and confident individual who will thrive in a busy environment. Candidate must be extremely professional in appearance and manner, willing to accept direction, quick to learn new things, and computer savvy. Superior phone, analytical, and computer skills required.

**Ideal Candidate Characteristics:**

- Obsessed with delivering a "wow" experience for clients
- Servant-hearted
- Outgoing and energetic
- Organized and detail-oriented
- Fluent in sarcasm and chop-busting
- Technologically inclined
- Great communicating with clients on the phone
- Overall cool person
- Adaptive and able to work in a fast paced and changing work environment
- Self-starting
- Goal-oriented

**Essential Duties and Responsibilities** (Additional duties may be assigned):

**Paraplanner**

- Works under wealth advisors and executive management to service clients
- Ability to organize and manage client information and paperwork, particularly financial planning documentation
- Provides operational support, usually to multiple financial advisors,

including preparation of reports and other materials for client meetings

- Focus on ongoing client engagement, including ongoing client contact, follow through and follow up on team commitments to client, client communications, meetings, and assisting with the on-boarding process
- Works collegially and productively with peers and other team members
- Commits to grow and increase level of knowledge related to wealth management
- Commits to ongoing growth of all skill sets and competencies needed to serve client, firm, and individual success
- Maintains familiarity with industry and economic trends and applies knowledge to client service and relationships
- Learns, maintains knowledge of, and shows ability to apply compliance standards
- Represents the firm's strategic brand and the team service concept
- Completes projects assigned by executive/professional tier as needed
- Performs general administrative and support functions for primarily the Weatherford office (while providing support to Fort Worth Office), including maintaining files, preparing paperwork, running reports, answering telephones, scheduling appointments, returning calls, copying materials, faxing, and shipping documents
- At times will handle scheduling of meetings with clients and vendors for advisors
- Organizes, coordinates, and maintains all client paperwork both physically and digitally
- Meets with advisors to review meeting deliverables when preparing for client meetings
- Ensures paperwork is completed and signed by advisors
- Corresponds with clients to complete new accounts, asset transfers, and other administrative forms
- Handles routine matters for client accounts, including processing name and address changes, account applications and bank authorizations, answering administrative client questions via telephone and face to face
- Researches and resolves client service issues by contacting Broker/Dealer, custodian and sponsor companies to resolve as needed
- Directs and screens client inquiries for advisors (received via phone calls, fax, e-mail and office visits)
- Proactively contacts clients when changes are occurring with their accounts (i.e., rider fees are increasing, incoming account transfers, withdrawals)
- Documents client contact in CRM and appropriate files
- Places trades or reallocates investments in client accounts, per advisor instruction only
- Reviews and edits advisor notes

**Core Competencies**

- Knowledge of financial services (or ability to learn financial services industry) and ability and willingness to expand knowledge range
- Ability to assist in and contribute in the development of all aspects of client services and the wealth management process
- Clear communication skills, particularly in explaining financial principles and concepts
- Ability to seek appropriate resources with the firm to help with and expand ability to deal with client situations
- Exhibits self-confidence, self-esteem, and self-awareness
- Ability to be flexible and adaptable to change
- Be approachable, respectful and reveal inclusive communication
- Set and model high performance standards

**Language Skills:**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**Mathematical Skills:**

Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of algebra and statistics. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

**Reasoning Ability:**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

**Computer Skills:**

To perform this job successfully, an individual should have knowledge of Microsoft Office programs, database software for phone notes, phone logs, and events, and general office equipment. Have knowledge and ability to use industry software such as research, planning, risk tolerance programs and be familiar with sponsor and broker/dealer platforms.

**Education/Experience:**

A Bachelor's degree from an accredited college or three years related experience and/or training; or equivalent combination of education and experience.

**Specialized Training:**

- Degree in economics, finance, financial planning or at least three years hands on experience in insurance products, securities (investments) and or financial planning
- Advisors are expected to be lifetime students and stay current with industry related education and training as required by our Broker/Dealer and any state or federal regulators

**Certificates and Licenses:**

- Working toward CFP® Certificate
- Working toward FINRA series 7 and 66
- Working toward Texas life, health, and variable annuity license

**Knowledge, Skills and Other Abilities:**

- Professionalism
- Oral communication skills
- Written communication skills
- Effective communication with clients when necessary
- Time management skills
- Ability to change direction quickly
- Ability to proactively determine needs and actions
- Ability to work as a team member and alone

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee will be required to sit, use hands, reach with hands and arms, and talk and hear. The employee is occasionally required to stand or walk. The employee will occasionally need to lift and/or move up to 10 pounds. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.