Para Planner / Full-Time / Financial Planning & Investment Firm

Job Summary

Financial planning firm seeking a graduate of the Financial Planning department, preferably with a master's degree.

Full-time (8-5, Monday - Wednesday and Friday 8-4). Located in downtown Fort Worth, TX; Upper-West Side

Salary, plus bonus, and Benefits
W2 Employee
Opportunity for advancement

Three-year apprenticeship path from Para-planner to Junior Advisor to Senior Advisor

Responsibilities and Duties

- Open and close office
- Process in/outbound mail and answer phones
- Prepare account paperwork accurately (new account, distribution/contribution requests, etc.) and follow up with clients and sponsor companies as needed
- Prepare for client meetings and reviews, including the preparation of reports, proposals and financial illustrations.
- Take thorough notes during new client meetings
- Use eMoney to enter client data, create scenarios and reports
- Complete client assumptions, asset recommendations and plan recommendation documents
- Maintain effective working relationships with clients by assisting with their requests and account actions to completion
- Maintain client records, CRM database, and compliance files
- Interface with team members, custodians, and insurance companies
- Other assignments, as needed

Qualifications and Skills

- Bachelor's degree in Financial Planning, Master's degree a plus
- Proficient in Microsoft Office & Windows (Word, Excel, Outlook) and with Adobe Acrobat
- Strong attention to detail with the ability to work independently while embracing team collaboration
- Highly organized
- Displays exemplary professional communication skills, verbal and written

- Must be professional, courteous, and dependable
- Excellent client service skills
- Ability to manage multiple projects at once with consistent follow-through Commitment to provide high-quality work both to internal and external partners
- Ability to meet deadlines
- Minimum 3 professional references required
- Process driven and results oriented
- Ability to work well in a fast-paced environment
- Ability to work legally in the United States
- Must obtain series 65 license within first 8 weeks of employment.
- Must obtain CFP within first year of employment

About Us

Strittmatter Wealth Management Group, LLC was established in 2007. We are located in downtown Fort Worth and work with high net worth clients to provide financial planning and investment management.

Seniority level - Mid-level
Employment type - Full-time
Job function Administrative financial planning
Industries: Financial Planning, Financial Services, Investment Management, Accounting