

Paraplanner

JOB SUMMARY:

As a Paraplanner, you will work closely with advisors in preparing and implementing financial plans. You will prepare client agreements, collect data, input client information into eMoney, and produce the final plan.

REQUIREMENTS:

- Working knowledge of financial planning concepts.
- Experience with financial planning software and applications.
- Proficiency in Microsoft Office Suite and eMoney Advisor (or similar software)
- CFP® or FPQP™ designation or working toward certification
- Securities registration (Series 7 & 66, or equivalent)
- FL Life & Health Insurance license (or be willing to be licensed within 90 days of hire)
- Must have two (2) years of experience in a similar role or capacity.
- Strong attention to detail and organization
- Excellent written and verbal communication skills

SKILLS AND KNOWLEDGE:

- Ability to work remotely with efficiently, effectively, and independently, with minimal supervision, and to see projects through to conclusion.
- Demonstrate analytical ability and good judgement, problem solver, takes responsibility, demonstrates personal integrity, honesty and able to deal with confidential information daily.
- High proficiency in Microsoft Office (Word, PowerPoint, Excel, Outlook).
- Excellent client service and oral and written communication skills.
- Professional and articulate with strong attention to detail.
- Excellent time management and strong organizational skills, and ability to prioritize multiple tasks and anticipate potential problems.
- Ability to work under pressure, meet deadlines and manage project details while balancing multiple priorities.
- Always thinking two steps ahead with a “whatever it takes” attitude.
- Optimistic, a forward thinker who actively seeks opportunities and proposes solutions.

RESPONSIBILITIES:

- Manage planning process – 40%
 - o Collect client data, organizing, and creating deliverables
 - o Track plan progress per workflow
 - o Stay up to date with broker dealer changes and updates
 - o Manage insurance, investment, and legal review process
- Analytics – 40%
 - o Review plan inputs and recommendations provided by back office
 - o Review client’s current financial, insurance, and investment positions
- Direct client interaction - 20%
 - o Collect missing data
 - o Website orientation and aggregation management
 - o Answer service questions
 - o Answer lower-level planning questions

EDUCATION AND EXPERIENCE:

- Active Series 7 and 66 licenses or equivalent.
- CFP® or FPQP™ designation or working toward certification.
- FL Life & Health Insurance license (or be willing to be licensed within 90 days of hire)
- Minimum 2 years working in similar role or capacity.

The position requires a proactive approach and the ability to independently carry out the duties of the position. The ideal candidate should have a positive attitude, high standards, excellent communication skills, and an ability to take initiative and prioritize tasks. You should enjoy working in a fast paced, team-oriented environment.

WHY JOIN OUR TEAM?

We have been in financial services for over 35 years and have a stable workforce with very little turnover. Not only do we take pride in cultivating a welcoming and supportive community and culture for our employees, but we also offer competitive benefits. We offer competitive pay, medical, dental, vision, basic and supplemental life insurance, short and long-term disability, 401(k) with employer match, generous paid time off & paid holidays.

We pride ourselves on service, ensuring our clients have great experiences when interacting with us. We are honest, trustworthy, and do the right thing when no one is looking. And we find innovative solutions for our clients, creating options where there was thought to be none.

We offer our employees an opportunity to be part of changing our client's lives. Coming to work every day knowing you're going to make a difference is its own reward, but we offer competitive salaries and benefits, too. If you thrive in a quick and always-changing environment, we would like to hear from you!