RSD Financial

Paraplanner

Term of employment

PART-TIME OR FULL-TIME

Objective

The Paraplanner role provides client relationship support for financial advisors through meeting preparation and follow up. This includes conducting managed account reviews and assisting in the preparation of a client's financial plan.

Key areas of responsibility

- Utilize financial planning software to enter client data, identify solutions and explore options to implement a financial plan
- Assist advisors with plan analysis and design
- Analyze financial planning recommendations and evaluate the impact of those recommendations throughout a client's financial plan
- Prepare comprehensive meeting agendas containing current client information
- Prepare reports and other visual aids to be used in meetings with clients
- Prepare paperwork for account applications, account transfers, beneficiary updates, etc.
- Maintain client contact during the financial planning process.
- Manage and resolve client issues
- Help with other planning/research work as needed.

Qualifications:

- Bachelor's degree. A degree in Finance or a related field is preferred.
- 1+ years of similar experience in Financial Services.
- Experience with a financial planning software eMoney or other planning software
- Must have experience with Microsoft Office
- No securities license required but willing to attain in future would be a positive
- CFP® designation is not required, but must be willing to complete coursework and attain in the future

Please remit resume to info@rsdfinancial.com