

Co-Planner/Paraplanner

Organization:	CJM Wealth Advisers
Date Posted:	11/1/2021
Date Needed:	11/15/2021
City:	Falls Church
Location:	Virginia
Country:	United States
Primary Category:	Financial Planning
Type of Position:	Full-Time
Education Requirement:	Associate's
Experience Requirement:	3-5 years

Description & Details

- Would prefer 3 years experience
- Proactively manage client relationships, working closely with primary planner.
- On a day to day basis, handle client calls and their questions/issues, appropriately resolve issues or elevate them to the Primary Planner. This involves significant time communicating with clients via phone, e-mail and letters.
- Work closely with Primary Planner and Operations (OPS) team on clients' annual reviews.
- Request/Generate/Process paperwork as required – leveraging the OPS team as needed
- Respond to client requests, utilizing the OPS team as appropriate
- Leverage the planner's time by working closely with clients to build rapport/relationships.
- Attend annual review meetings, on occasion
- Hold meetings with clients re: special requests, on occasion
- Must have excellent written and verbal communication skills

- Work within multiple software programs
- Proficient with MS Office Suite (esp. Outlook and Excel)
- Experience with Junxure, Orion, Money Guide Pro, Morningstar would be helpful
- Must have, and maintain, CFP designation.
- Work in the physical Falls Church office and remotely each week.
- Ideally we would like someone who has their CFP but does not want to move into a Financial Planner's role, or commit to a minimum of three years before moving into a Planner's role.
- Salary range: \$70k to \$100k, based on experience.

How to Apply / Contact

To apply for this position, please email your resume and cover letter: DELARDID@CJMLTD.COM

Initially, we will conduct phone interviews and from there, we will have in person interviews in our Falls Church office.

We ask that you come and go while wearing a mask. We may remove our masks while conducting interviews, as long as all parties are vaccinated and comfortable sans mask.

We look forward to meeting you.

Debbie Delardi

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