Paraplanner needed for a financial planning office

Job Title: Paraplanner

Staff Leader: Chief Executive Officer

Who We Are: Crown Wealth Management is a wealth management company located in Orange County, CA. We have achieved our personal and professional success by giving custom-tailored advice that reflects our client's unique lifestyle and financial situation. Our services include Comprehensive Financial Planning, Investment Management, Tax and Business Planning and Giving and Estate Planning. We are seeking a paraplanner who is responsible, organized, professional, self-motivated, and dependable.

Position Overview: The position will support our lead planners, by preparing for client meetings, collecting data, and monitoring changes; while providing a high level of customer service to the existing clients of our firm. We are a small firm who serves a variety of interesting and diverse people.

The successful candidate will support the two Certified Financial Planner™ Professionals who guide our clients as fiduciaries to "Live Abundantly. Give Generously."

Major Responsibilities:

- Prepare financial planning information for new clients: This involves integrating all client data, inputting data accurately into planning software and preparing meeting agendas. Subject matter areas that are covered in the initial plan include: Net Worth, Tax Planning, Cash Flow, Investments, Performance, Insurance Review, Education Funding Analysis, Estate Distribution Plans, etc.
- Prepare for review meetings (for existing clients): Review past agendas and notes to determine appropriate agenda and planning issues for Lead Advisors to discuss. Reach out to existing clients to gather any necessary data for review meetings. Update client net worth statements, prepare investment reports, and perform any other task necessary to prepare for the client meeting.
- Ensure that your tasks, account opening paperwork, money movement forms, DocuSign, etc. are completed timely and accurately for onboarding and ongoing client service.
- Perform post meeting follow-up: Paraplanner will review Lead Advisor meeting notes and create tasks/workflows for any follow up items.
- Answer client emails and advise on straightforward planning issues: Clients often email Lead Advisor with straightforward planning questions –Paraplanner will answer these questions and give appropriate advice (Lead Advisor will forward emails to Paraplanner that are sent to Lead Advisor but should be answered by Paraplanner).

Other tasks: Paraplanner will assist with data entry into tax planning software.

Desired Qualities and Skills

- Minimum 2-5 years of experience in a financial services office.
- Ability to pass a background check
- Positive attitude
- Self-starting
- Detail oriented

- Desire to serve clients and assist co-workers
- Proven technical, analytical, and problem-solving skills
- Capability to excel in a team environment
- Strong organization skills and ability to prioritize and complete multiple time-sensitive tasks
- Personal integrity and ability to discreetly handle confidential data
- Effective written and oral communication with clients and other advisors/staff
- Polite and clear phone manner
- Ability to work independently
- Strong computer and software skills to include proficiency with Outlook, Word, and Excel
- A plus would be demonstrated computer competency and knowledge of specialized software applications that are firm specific. (i.e., Redtail, Albridge, Holistaplan, eMoney, etc.)

Compensation and Perks:

- Salalry commensurate with experience
- Position will requires coming into the office for client meetings several times a week.
- Free financial planning, of course.
- Benefits start at eligibility

Applications are being accepted: To apply for this position, please send cover letter and 200 word relevant writing sample of why you would like to work at Crown Wealth Management to admin@crownwm.com