Support Advisor/Paraplanner

Organization:	Hopwood Financial Services
Date Posted:	12/7/2021
Date Needed:	1/1/2022
City:	Reston
Location:	Virginia
Country:	United States
Primary Category:	Financial Planning
Salary:	$57,500.00 yearly
Type of Position:	Full-Time
Education Requirement:	Bachelor's
Experience Requirement:	1-2 years

Description & Details

Support Advisor/Paraplanner

Firm's Purpose: To make a meaningful difference in people's lives.

Position Overview: The Support Advisor/Paraplanner works directly with the Lead Advisors and Director of Financial Planning to assist with the wealth management and financial planning needs of clients. This position is responsible for providing support to Advisors including data gathering, case design, scenario building, financial plan development and implementation.

Duties & Responsibilities:

- Prepare materials for client meetings; work with other team members to ensure client meetings are prepared for thoroughly and accurately. Attend client meetings and take notes as requested; manage/delegate/complete all meeting follow-up items.
- Provide support for the financial planning needs of clients including:
    - Create drafts of financial plans.
    - Prepare all retirement forecasts, cash flow and insurance analyses, education forecasts, estate flows, etc.
    - Conduct research as needed and work with client's other advisors (attorneys, CPAs, etc.) to obtain all necessary data for financial planning analyses.
    - Identify areas of opportunity and risk for clients based on financial planning analyses.
- Initiate and field client calls and e-mails on various planning items, miscellaneous requests and advice on various topics as appropriate.
- Perform special request analyses for clients (e.g., mortgage analysis, Social Security analysis, etc.).

Qualifications:

- Bachelor's degree preferably in business, accounting, finance, economics or related experience.
- 1-2+ years of experience (may include internships) in client service in the financial services industry (preferably with an independent registered investment advisory firm).

- Proficiency in Microsoft Office; experience with various financial planning (MoneyGuidePro preferred), CRM, portfolio management and document management software.

Other Skills & Experience:

- Continuously exhibits personal integrity and professional initiative.
    - Reliable, follows through on commitments, does not shrink from new challenges.
    - Possesses a passion to help new and existing clients.
    - Must be organized, detail-oriented and able to manage and prioritize tasks.
    - Demonstrates a commitment to accuracy by delivering high quality work.
    - Excellent written and verbal communication.
    - Self-starter who can meet deadlines working independently when needed.
    - Flexible team player who is highly adaptable to change and open to new ideas.
    - Demonstrated ability to work successfully in an entrepreneurial, small company environment.
    - Maintain professional competencies and adhere to the firm's ethical standards and cultural values.

Salary Range: $55,000 - $62,500

Benefits: Medical and dental coverage, 401(k), L-T disability, PTO and paid holidays.

How to Apply / Contact

Post resume and willingness to start as soon as 1/1/2022.

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