Position title: Paraplanner

Position Description:

Step into an instrumental role as an Paraplanner with a Financial Advisory practice with Ameriprise Financial. This company is built on strong values and principles and strives to uphold the highest levels of integrity, honesty, caring, and thoughtfulness while delivering excellent advice. This position has a responsibility of representing the company in a positive and professional manner.

The Paraplanner will assist the financial advisor in working with clients to help them achieve their financial goals. This role provides client relationship support through managing, gathering, and analyzing client data, helping prepare preliminary financial plans and other client deliverables, working with clients to resolve issues and other practice management tasks as needed. Responds to ad hoc requests, coordinates/tracks projects and/or manages business-as-usual projects.

Responsibilities and Time Allocation – Will change over time to meet the needs of the practice and can include other duties as assigned by the advisor.

- Gather and enter client data into the financial planning tool
- Prepare preliminary financial planning recommendations and initial product solutions for advisor review and use in client meetings
- Prepare charts, graphs, tables, and other visual aids to be used in implementation meetings with clients
- Prepare for client meetings. Develop portfolio/robust product solution recommendations that will fit the client's risk tolerance and time frame as well as develop appropriate product deliverables
- Keep track of client engagement, follow up, and prospects utilizing systems
- Service client needs daily and in a timely manner. Clients get called back same day
- Run illustrations and hypotheticals
- Execute trades on behalf of the advisor
- Review work methods and procedures for possible quality improvements and efficiencies
- Perform other allowable duties as assigned by the financial advisor(s)

Key Traits of a Successful Paraplanner

- Strong initiative, with attention to efficient time management
- Direct attention to detail and organization
- Effective, respectful communication with clients and other advisors/staff
- Polite and clear phone manner
- Ability to multi-task
- Ability to take initiative and problem solve independently
- High level of interpersonal skills

- Positive attitude and sincere willingness to constantly learn and grow

Education and Other Designations:

- College degree or higher
- 2+ years of similar experience preferred within an advisory practice
- Already have federal and state licenses and registrations for securities: Series 7, Series 66, and State life, accident, and health insurance licenses or willing to get within 6 months of employment.

Job Type: Full-time

Pay: $55,000 - $65,000 per year, dependent on experience and licenses held

Benefits:

- Simple IRA plan
- 2 weeks paid, time-off
- 8 paid holidays

Schedule:

- Monday to Friday

Education:

- Bachelor's degree

Experience:

- Financial services: 2+ years (Preferred)

License/Certification:

- Series 7
- Series 66
- Life, Accident and Health Insurance license
- *Or willing to get all licenses within 6 months*

Work Location:

- One office location

Resumes should be sent to Weslie.Green@ampf.com