

Financial Planning Assistant – Full and part time positions available

Summary

WC Moore Financial Services is expanding our Centreville, VA Financial Center. As such, we are currently seeking staff positions to join the firm to assist with day-to-day operations. The ideal candidate for this position is a professional eager to learn all aspects of financial planning (investments, insurance, retirement, and estate planning). The candidate should intend on pursuing a career in financial planning in either a planner or support role.

Description

- Prepare forms, documents, application forms, trade orders, client profiles, etc.
- Setup client files and maintain files with required documentation
- Prepare portfolio reports and product comparison reports
- Download and collate documents and other research
- Update and maintain CRM database (Redtail)
- Special projects as assigned
- Assist other departments on as needed basis

Preferred Requirements

- Attention to detail, strong organizational and math skills
- Proficiency with Microsoft Office and CRM software, excellent Excel skills
- Ability to perform multiple tasks efficiently and accurately
- Strong ethics with a customer-oriented attitude
- Bachelor's Degree program in Finance, Math, Business, or related field or equivalent experience
- Knowledge of financial services, investment and/or insurance industries

Please submit resume and cover letter to wcmfs@aicivest.com.