



Fort Worth, Texas Paraplanner

Caleb Brown
Recruiter

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INTERESTED?

Apply here:

<https://bit.ly/47r8JS8>



NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing an RIA in Fort Worth, Texas that is seeking a Paraplanner to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



GROWING, BOUTIQUE, CLIENT-CENTRIC

Our client is a boutique firm that has been in business since 2004 and serves 300 households. The owner is a Gen X'er who loves to learn and is very forward-thinking. They believe strongly in growth, development, and mentorship. If you are looking for the opportunity to learn the business, this is the opportunity for you. This position does not have production requirements and has a path to an advisor position if desired.



WHAT YOU WILL BE DOING AND LEARNING

Support financial advisors by preparing presentation materials for client meetings. Attend and participate in client meetings. Record meeting notes on topics covered, changes in client's needs, and action items. Coordinate financial plan creation, including initial financial plan data entry, development and working with financial advisor to develop recommendations. Assist with rebalancing portfolios, and any post meeting follow up items. Learn the business while helping support the current team support their loyal clients.



QUALIFICATIONS

Bachelor's degree from an accredited university. Series licenses highly preferred or willing to obtain. Completion of CFP® coursework and intention to obtain CFP® designation within 3 years. Competency in investment and financial planning. Advanced level computer skills; familiarity with eMoney software preferred. Excellent oral, written and interpersonal communication skills. Passion for helping clients achieve their goals, and a desire to strengthen alliance partnerships to facilitate this work. Strong analytical, organizational, presentation, and computer skills. Proactive team player able to work in a fast-paced environment.



THE PERKS

Competitive salary starting at \$60k. Health insurance stipend. Disability insurance. 401k Matching on first 6% contributed. Annual Profit Sharing (allocated to 401k plan in addition to contribution match). Flexible work schedule. Ability to work from home (majority of time is expected to be in office). Paid membership to FPA along with admission to FPA DFW Convention. Coverage of CFP Review Course, exam fees, and first year CFP fee.