Job Title: Paraplanner

Firm: SecureBridge Wealth Advisors with Ameriprise Financial

Location: Glen Allen, VA (Innsbrook area – far West End of Richmond, VA)

Job Type: Full-Time

Work Setting: In-office

Full Job Description:

Seeking a detail-oriented support person to join our 16 person locally owned office of a Fortune 500 company. This person will develop and help advisor's implementation of financial plans for clients using Money Guide Pro and other tools. The ideal candidate will have a strong understanding of financial planning concepts, exceptional analytical skills, and the ability to work independently and as a team member.

This role will appeal to someone who wants to:

a) develop a career as a valued support professional in an important analytical role. For the right candidate there is an entire career path possible with this position.
b) sharpen their skills in preparation for advancing into a producing advisor after a *minimum* of 3 years in this support position.

Please note: there is no aspect of "selling to clients" in the paraplanner role at our firm. Candidates who already have a book of business will not be able to bring their clients with them to this position. Also, while this is a support role, it is not an administrative position. The firm already has several long-serving administrative assistants / client service managers.

Responsibilities:

- Assist financial advisors in gathering client information and analyzing financial data to support the financial planning process.
- Prepare comprehensive financial plans, including retirement planning, investment analysis, estate planning, and risk management.
- Conduct research on investment products, tax strategies, and regulatory requirements to support client recommendations.
- Generate client presentations and reports to that will help the advisors communicate financial recommendations effectively.
- Collaborate with internal teams to ensure seamless client service delivery and implementation of financial plans.

Qualifications:

- Bachelor's degree preferably in Finance, Economics, Business or related field.
- Previous experience in financial planning or wealth management preferred
- Strong knowledge of financial planning concepts, including retirement planning, investment strategies, and tax planning.
- Excellent analytical, communication, and problem-solving skills.

- SIE, Series 7 & 66, Life, Health & Annuities licenses or willingness to obtain within six months of hire date. Special consideration will be given to candidates with the CFP® designation and graduates of a college CFP® Certification Education Track. Note: these designations are critical for the paraplanner role even though there is no selling involved.

Benefits:

- Competitive salary commensurate with length of career experience and professional designations with the potential for an annual bonus.
- Comprehensive benefits package including health, dental, and vision insurance.
- 401(k) retirement savings plan with company match and profit sharing.
- Paid holidays and PTO program.
- Professional development opportunities and support for industry certifications.
- Collaborative and supportive work environment with opportunities for growth and advancement.

How to Apply:

We realize this listing is brief and will be delighted to share more details after reviewing your resume.

If you are passionate about helping clients achieve their financial goals and possess the skills and qualifications outlined above, we encourage you to apply by sending your resume and cover letter to KLMAssociates2024@gmail.com. Please include “Paraplanner Application” in the subject line. We look forward to reviewing your application!