Paraplanner
Riverstone Wealth Advisory Group | Midlothian, VA

Riverstone Wealth Advisory Group, a Private Wealth Advisory Practice of Ameriprise Financial, is seeking a full-time Paraplanner to join our innovative and client-focused team. At Ameriprise Financial, we help people feel confident about their financial future by providing comprehensive financial planning and investment advice to families, individuals, and small businesses. Our mission is to simplify financial lives while helping clients achieve their goals.

The Paraplanner will provide exceptionally professional, friendly, and high-quality service to our clients. This position works closely with advisors and clients to support financial plan development, prepare for client meetings, facilitate transactions, and conduct investment research.

This role is not currently intended to evolve into an advisor track, although, a clear career path, with the opportunity to advance into an Associate Financial Advisor role within three to five years, is possible based on performance, licensing, and experience.

This role is primarily in-office to ensure a strong foundation in training, team collaboration, and client support. Following the completion of licensing requirements, initial training, and/or a 6-month introductory period, there may be the possibility of transitioning into a hybrid work arrangement.

How to Apply
Please your resume and a cover letter to joseph.r.stemmle@ampf.com. Please include "Paraplanner Application" in the subject line.

Key Responsibilities

- **Client Support:** Act as a point of contact for clients—respond to inquiries via phone or email and support a seamless client experience. Monitor and respond to key action items from the home office.
- **Financial Planning Support:** Assist advisors with entering data for client plans and preparing financial plans using MoneyGuide and Naviplan.
- **Meeting Preparation/Follow Up:** Prepare presentation materials, reports for client meetings using PowerPoint and other tools, and implementing post-meeting follow ups. Attend client meetings, providing support and detailed notetaking. Execute trades with documented direction from an advisor.
- **Team Collaboration:** Support advisors and other team members to ensure smooth operations and exceptional client service. Review and maintain client reports and documentation.

Compensation & Benefits

- **Salary:** $50,000 - $75,000, based on experience. With the potential of a bonus up to $20,000/year based on reaching pre-determined goals and performance.
- **Incentives:** Opportunities for bonuses and performance-based incentives.
- **Paid Holidays:** 15 market holidays per year.
- **Paid Time Off:** Starts at 12 days – 1st year is prorated and up to 22 days after 5 years with the ability to roll over up to 5 days per year. 8 hours of volunteer time off per year.
- **Work Schedule:** Monday – Friday, 8:00 AM – 5:00 PM EST
- **Work Environment:** In-office position initially, with potential for a hybrid schedule in the future.
- **Benefits:**
    - **Stipend**: $500/mo stipend to be used for any benefits.
    - **Health Insurance, Dental, and Vision**: Coverage available for employees.
    - **401(k):** Profit sharing plan with a match.
    - **Group Life and Disability:** Coverage available for employees.
    - **Section 125 plan:** Medical Care Expense Reimbursement (FSA), LIMITED Purpose FSA, Dependent Care Expense Reimbursement, Transportation & Parking Fringe Benefits, and Non-Employer Sponsored Premiums.

<u>Key Skills/Abilities/Knowledge/Competencies:</u>

For success in this role, an individual must be able to perform each primary responsibility at a basic level. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Bachelor's Degree or Two years' related experience and/or training; or equivalent combination of education and experience.
    - Pending graduates for Spring semester 2026 are welcome to apply.
- Required licenses
    - Series 7, 66 (or 65 & 63) and state Life, Accident & Health; and/or any licenses currently required by Ameriprise Financial. (or ability to obtain within six months)
    - Open to a candidate currently pursuing licensure.

Language Skills:

- Able to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations.
- Able to write reports, business correspondence, and procedure manuals.
- Able to effectively present information and respond to questions from managers, clients, customers, and the general public.
- Excellent written and verbal communication skills are essential and mandatory.

Computer Skills:

- Highly proficient with Microsoft Office Suite (Excel, PowerPoint, Word, Outlook).
- Experience with MoneyGuide or Naviplan strongly preferred.
- Experience with Salesforce strongly preferred.

Technical duties, tasks, and skills:

- Able to process Money Movement requests.
- Able to prepare and understand a financial plan.
- Able to navigate the Ameriprise Financial website and guide clients through the website.

Other Skills and Abilities:

- It is essential that the Paraplanner role has a high degree of integrity, honesty, commitment, and trust. The financial health, image and goodwill of the company are highly influenced by the person holding this position.
- The successful Paraplanner will have excellent inter and intrapersonal relationship skills, effective communication skills and the willingness to show empathy and understanding for various points of view.
- Able to communicate with clients in a professional, clear, and concise manner is essential.
- The Paraplanner must exercise discretion in dealing with the personal information of clients.
- Ability to manage multiple responsibilities effectively.

Physical Demands:

- This position requires the ability to handle significant levels of varied stresses, in particular mental stresses and fatigues. This position operates in a fast paced, highly regulated, and ever-changing environment. There are no significant physical demands other than the endurance required to deal with the fast pace and stresses.
- The work environment is typical office work such as you would find in a bank, insurance business, accounting firm, law firm or other professional office. There are no unusual or significant hazards and reasonable accommodations can usually be made.