

Portfolio Manager/Paraplanner

Established, rapidly growing RIA fee-only firm in Bellevue, WA seeks a highly motivated portfolio manager/paraplanner who can conduct market research, manage and analyze portfolios, and develop personalized planning recommendations. We focus on being a guiding force for change in our industry and empowering our community to make educated financial decisions. Mainsail is a fast-growing firm established in 2019. As of 2024, we have grown over 10 times with a similar trajectory ahead.

We invest heavily in our team and provide a unique opportunity. Mainsail Financial Group offers a place to flourish, push yourself, grow, and make an impact. We strive every day to foster a firm of excellence and are looking for team members who possess the following qualities:

- An **enthusiastic** contributor who aims to make the most of each day
- **Self-disciplined** to consistently make an impact
- A **collaborative**, goal-oriented team member
- A strong desire to **empower** and educate team members on investment strategies
- **Relentless** in their pursuit of personal and professional growth

Our ideal candidate:

Given our path ahead, an ideal candidate would be someone that is excited for the opportunity to join an established firm with a bright future and the opportunity to grow together with no limits to your career development potential. As a result, we are looking for someone who can hit the ground running, is excited to jump in headfirst, and take on additional opportunities.

What we provide to our team members:

For the right person, Mainsail Financial Group offers a place to flourish, push yourself, grow, and make an impact. We have centralized a lot of the minutia to allow our team members to focus on utilizing their unique skillset in their role. Additionally, team members who are interested in pursuing professional growth have the opportunity and are encouraged to do so while at Mainsail. Some of our team members have completed certifications and graduate degrees. Our goal-driven organization also rewards team members who reach and exceed their goals.

The work you will be doing:

- Conducting market research
- Managing model portfolios for the firm's clients alongside leadership team

- Assisting the investment team in evaluating new investment strategies
- Portfolio rebalancing and trading
- Trading for client cash needs and incoming assets
- Analyzing prospective client portfolios and helping with recommendations for the advisory team
- Communicating with clients and the advisory team on investment strategies
- Gathering data, including goals, to analyze and evaluate financial status
- Developing personalized financial planning recommendations and/or alternatives
- Remain up to date on industry developments, service and product enhancements, regulatory issues, etc.

Qualifications:

- FINRA Series 65 required and/or CFP® designation
- Excellent knowledge of and ability to communicate financial planning concepts and terminology
- Excellent knowledge of and ability to explain products, such as mutual funds, stocks, and bonds, as well as the ability to convey financial concepts and strategies
- Self-motivated and entrepreneurial; goal-oriented at an individual and team level
- Experience with multi-client portfolio management and trading
- CFA or equivalent analyst knowledge
- A commitment to conduct business with honesty and integrity
- Additional advanced degree/designations are a plus (e.g., MBA, CFP®, CPA)

Benefits and Compensation:

- Paid time off
- Medical and dental insurance
- Health insurance

About Mainsail Financial Group:

Mainsail Financial Group is located in Bellevue, WA. We believe in goal-based planning and focus on providing retirement-age individuals and families with a plan for long-term security and a comfortable lifestyle, addressing tax-efficient strategies and legacy planning.

We are a fast-growing firm that started in 2019 with just over \$20M AUM. In 2024, we have grown to over \$250M. Looking ahead, we expect this growth trend to continue, and our goal

is to hit \$1B by 2029. We are focused on working as a guiding force for change in our industry and empowering our community to make educated financial decisions.