Position: Paraplanner – Associate Advisor

Position Summary: The Paraplanner position provides direct technical and client service support to the Managing Partner. While Associate Advisors will spend a few hours each day supporting the Managing Partner in client meetings or answering client requests, the bulk of their time is spent preparing and updating financial plans for client meetings. The Associate Advisor will have no formal business development responsibilities and will not develop their own client base. The Associate Advisor should embrace a team approach to client management and the support functions of financial planning.

About True Wealth Advisory Group: At True Wealth Advisory Group we have been partnering with Bay Area families and individuals for over 30 years to help them make smart choices about their money so they can do the things in life that are most important to them. We serve a select client base of approximately 250 households that is continually growing by referrals only. We pride ourselves on having deep, multi-generational relationships with our clients that are built on the highest levels of trust and care.

Required Skills and Experience:

- Extremely high attention to detail
- Previous client service experience
- Strong understanding of brokerage regulations and rules that govern client accounts
- Demonstrated experience handling client concerns and issues with tact and diplomacy
- Ability to work independently and effectively as part of a team, while handling multiple tasks and responsibilities simultaneously
- Ability to manage multiple client situations, needs, and inquiries simultaneously
- Ability to develop and implement systems and processes
- Ability to develop client service-related technologies
- Ability to research complex financial situations
- Ability to communicate with co-workers, clients, and various business contacts in a courteous and professional manner
- Ability to investigate, research, and resolve problems or concerns
- Ability to maintain confidentiality
- Ability to organize, prioritize, and handle multiple tasks
- Ability to take complete and accurate notes
- Excellent communication (oral and written), interpersonal, and organizational skills
- Proficient in the Microsoft Office Suite
- Experience with financial planning/management software (MoneyGuide Pro, Redtail, NetX 360, Charles Schwab, Orion)
- Series 7, 65 licenses or the ability to obtain immediately upon employment
- Professional Designation, CFP Certification strongly desired
- Minimum 5 years of relevant financial services experience
- Bachelor's Degree

Job Description

- Attends client meetings and takes extensive notes
- Analyzes client information and prepares reports and presentations

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- Analyzes asset allocation and generates rebalancing trades
- Researches products and product pricing and contacts carriers for information
- Answers basic questions for clients and assists in processing client requests
- Fills out necessary forms for opening or maintaining accounts (if not performed by an Operations Specialist)
- Interfaces with the broker-dealer or custodian to obtain information or account data and convey service requests
- Sets up and retrieves reports in the financial management software systems
- Proactively communicates with clients on a regular basis through a range of communications vehicles
- Discusses and organizes follow-up steps with the advisors or firm principals after client meetings
- Executes equity, fixed income, mutual fund, and variable annuity transactions under the direction of the firm principal or advisors
- Monitors client account activity
- Manages all details of clients and prospects in CRM

Target Compensation:
Salary commiserate with experience
Bonus potential based on firm metrics
Paid Vacation and Holidays
Employer Paid Health Insurance

For More Information Please Contact:
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