We are seeking a Financial Paraplanner to join our dynamic team and support our advisors in guiding our clients through our unique and rewarding financial planning process. The Paraplanner will work closely with our advisors to analyze client financial data, develop a proposal for the client and assist in the several step planning process with the client. We are looking for a candidate who is detail oriented, possesses strong communication skills, and has excellent follow through.

Responsibilities to include:

- Analyze client financial documents, including statements, tax returns and insurance policies, to ensure an accurate financial picture for planning purposes.
- Assist in creating planning proposals and financial reports for client meetings.
- Collaborate with advisor(s) to develop client financial plan and work with advisor(s) to take client through our unique process.
- Conduct research on market trends and investment products, as it pertains to the firm's investment strategies.
- Ensure compliance in planning and trading by remaining updated on industry regulations.
- Collaborate with team members to enhance the financial planning process.

Qualifications and Requirements:

- Minimum of two years financial services experience
- Bachelor's degree in finance, economics or other related field, or Financial Paraplanner Qualified Professional Certification
- Series 65 Licensed
- Experience with financial planning and trading software.
- Able to work both collaboratively and independently as needed.

Firm Overview:

We are a successful fee-based wealth management firm. Our financial planning process is dedicated to creating clarity for our clients on what matters most to them, as well as what's next for them. As fiduciaries, we value strong relationships, and our process is designed to get to know our clients by identifying their core values. These values help develop the clients personalized plan and investment strategy. Our goal is to provide financial peace of mind to our clients so that they may focus on the people, places and experience that give their lives true meaning.

Details:

- Full Time
- Pay: $ 75,000 - $ 95,000 annually
- 401k
- Health Insurance
- Vacation/Sick Time
- Monday-Friday, in person
- Please email info@gebhardtgroupinc.com to submit resumé.