



Paraplanner

We are currently pursuing a Paraplanner that can transition into an advisory role to become an Associate Wealth Manager within 24-36 months. The role of the Paraplanner is to support the Wealth Managers on financial strategies, plans, and projects while receiving technical training and one-on-one mentoring. They are also responsible for maintaining the client relationship as the first point of contact for clients. Under close supervision of a Wealth Manager, the Paraplanner will have the opportunity to lead select client cases. It is from our Protege Program that we grow our future Wealth Managers.

Essential Responsibilities

- Input data into financial planning software
- Prepare comprehensive financial plans, reviews, reports and client presentations
- Prepare Senior Advisor and staff in advance to client meetings
- Assist with the management of assigned client cases, including preparation of meeting agendas, client correspondence, quarterbacking all tasks to completion
- Attend client meetings, take detailed notes, prepare follow-up emails, debrief and assign appropriate actions to staff
- May perform basic investment research and research client's company benefits
- Attend weekly Wealth Management meetings and bi-monthly Investment meetings.
- Assist with client service and operations

Qualifications

- Bachelor's degree in Finance, Business, Accounting or Financial Planning required
- Master's or Graduate degree preferred (Masters in Finance, JD, MBA)
- One to three years working experience, or internship in similar industry
- Currently pursuing either CFP, CFA, or CPA designation
- Currently possess or pursuing the Series 65 securities licenses
- Strong technical and interpersonal skills
- Confident, poised and professional in appearance
- Ability to take on creative challenges and manage workload on tight deadlines
- Ability to collaborate and contribute to a team environment

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the selection process. To apply, please email your resume and cover letter to jobs@wjohansonassociates.com with your full name, followed by "Paraplanner" in the subject line.