Job Description

Job Title: Associate Wealth Management Advisor or Paraplanner
Department: Wealth Management Team
Reports To: Managing Director or Senior Wealth Management Advisor

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Summary of Position
The Associate Wealth Management Advisor (AWMA) or Paraplanner will serve on our wealth management team to support our existing and prospective clients. The entry level for this position (AWMA or Paraplanner) will be determined by level of education and/or experience. They will provide client support for existing clients; respond to inquiries from prospective clients; work closely with more senior advisors to provide financial planning and advice; understand appropriate investment strategies; develop leads from existing and prospective clients; and complete other ad-hoc projects as requested.

Essential Functions and Basic Duties:
The following reflects management's definition of essential functions for this job but does not restrict the tasks that may be assigned. Management may assign or reassign duties and responsibilities to this job at any time due to reasonable accommodation or other reasons.

- Provide exceptional service to our clients, prospects and other business contacts
- Assist in preparing for and participating in client reviews, as well as meeting documentation and follow up
- Work with more senior advisors to evaluate client needs and wants and provide appropriate investment and planning advice
- Is responsible for a significant portion of data input for creation of financial plans and tracking status of plans in CRM
- Participate with more senior advisors in client meetings to deliver financial plans and advice
- Respond to incoming requests for additional information from clients and prospective clients
- Communicate to clients changes in strategies, procedures, or other relevant information as appropriate
- Contribute as needed to the timely and accurate delivery of monthly investment recommendations to retirement plan advice participants
- Conduct tutorials for new retirement plan advice participants
- Ensure investment and service requests received from clients are handled according to established procedure or assigned effectively
- Provide other client service support, as needed, including phone calls and paperwork

- Create and work with email and contact filters as needed to manage communications and records
- Maintain written procedures in applicable areas
- Identify and contribute ideas to improve processes within the department
- Assist with special projects as assigned and perform other duties as assigned

Education/Experience:
- Bachelor's degree in a related field
- Ideally have 1- 5 years of experience as a financial advisor, planner, or investment professional, or have completed an internship within the financial services industry
- Certified Financial Planner (CFP) designation preferred, but not required

Skills/Abilities:
- Strong commitment to outstanding customer service
- Firm understanding of financial products and services, including investments such as ETFs and various investment approaches
- Strong organizational skills and acute attention to details
- Ability to deal effectively with a diversity of individuals at all organizational levels
- Excellent oral and written communication skills
- Excellent computer skills in Microsoft Word, Excel and PowerPoint
- Experience with eMoney preferred, but not required
- Ability to handle multiple tasks simultaneously and prioritize responsibilities
- Ability to work independently and as a member of various teams
- Flexibility and willingness to work within changing priorities with enthusiasm
- Positive, can-do attitude; team player; good interpersonal relationship skills

Interested candidates should email cover letter and resume to kolson@qawealthmanagement.com