Associate Wealth Management Advisor or Paraplanner
Minnetonka, Minnesota

QA Wealth Management is a Registered Investment Advisor driven by values. Since our founding, we have managed our firm to serve the interests of our clients first, compelled by a perspective that the best businesses focus on treating others the way they want to be treated. This guiding principle is the basis for our firm's core values which inform how we run our business, treat our team and, most importantly, how we serve our clients.

From our office in the Minneapolis area, we provide investment management, advice, and financial planning to clients across the country.

Summary of Position
The Associate Wealth Management Advisor (AWMA) or Paraplanner will serve on our wealth management team to ensure our clients receive exceptional service and advice. The entry level for this position (AWMA or Paraplanner) will be determined by level of education and/or experience. The role includes hands-on financial planning work and frequent interaction with clients. Additional responsibilities include:

- Work closely with lead advisors to evaluate client needs and wants and provide appropriate investment and planning advice
- Enter client data for creation of financial plans, update status of plans in CRM
- Participate with lead advisors in client meetings to deliver financial plans and advice
- Assist in preparing for and participate in client reviews & related follow-up
- 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
- Ensure investment and service requests received from clients are handled according to established procedure
- Create and work with email and contact filters as needed to manage communications and records
- Conduct tutorials for new retirement plan advice participants
- Contribute as needed to the timely and accurate delivery of monthly investment recommendations to retirement plan advice participants
- Identify and contribute ideas to improve processes within the department
- Assist with special projects

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
- Exceptional organizational skills and attention to details
- Professional demeanor
- Excellent oral and written communication skills
- Excellent computer skills in Microsoft Word, Excel and PowerPoint
- Experience with eMoney preferred
- Ability to handle multiple tasks simultaneously and prioritize responsibilities

ADA Requirement

This job will primarily involve working in an office environment (stand, sit, walk), using the computer (hand and finger dexterity), and speaking to clients and co-workers (talk, hear). Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

For Company information visit https://qawealthmanagement.com/

Interested candidates should email cover letter, resume, and salary expectations to info@qawealthmanagement.com