

Client Service Associate/ Paraplanner

BGM Wealth Partners is a successful, independent RIA Financial Planning and Wealth Management firm located in Bloomington, MN. Our team and clients benefit by the additional expertise of our highly qualified affiliated companies that include accounting and trust operations.

We believe that understanding our clients' lifestyle and goals, addressing their current and long-term concerns, and developing comprehensive financial plans is essential in maintaining and increasing our clients' wealth. We measure success not by comparing returns with those of other managers, but by clients' satisfaction in meeting life goals. To this end, we seek a Client Service Associate / Paraplanner to join our team that will initially split time between performing client service and other operational tasks and supporting the Wealth Partners through planning support. **This position can work in-person or remotely.**

- This position has a diverse and busy schedule that includes:
- Organizing and ensuring proper completion of client paperwork
- Following up on client service issues in a timely manner
- Providing assistance to Lead Advisors on all aspects of client service
- Gathering client information and inputting data for financial plan preparation and review
- Participating in client meetings, tracking and completing follow up items generated by client meetings

Successful candidate will have the following skills and knowledge:

- Excellent communication skills (verbal, written and listening)
- Excellent time management and strong organizational skills, and ability to prioritize multiple tasks and anticipate potential problems
- Excellent follow-up and follow-through capabilities
- Proficient in Microsoft Office Suite (Outlook, Excel, Teams)
- Familiarity with the following industry related program considered a plus: Charles Schwab, Salesforce, MoneyGuidePro, Tamarac, YCharts.
- FPQP designation or willingness to obtain designation. Alternatively, course work towards or completion of the Certified Financial Planning (CFP®) certification is a plus.

Our culture stresses integrity, independence, accountability, inquisitiveness, and industry passion to seek and share knowledge. While some previous experience would be useful, candidates with a diverse background are welcome to apply! We are willing to share our knowledge with someone eager to learn.

BGM Wealth Partners offers competitive compensation, and benefits including medical, dental, vision, life insurance, 401(k) plan, paid holidays, paid time off, reimbursement for educational expenses and professional dues. Our employees benefit from an established and growing clientele, an entrepreneurial environment that emphasizes personal growth, and a flexible work arrangement.

BGM Wealth is an Equal Opportunity Employer

For more information about our firm, please visit our website at www.bgmwealth.com. Please direct your cover letter and resume to: svillaume@bgm-cpa.com