Senior Paraplanner/Junior Advisor

Ameriprise – Inver Grove Heightsor Wayzata, MN – an Ameriprise Financial advisory practice is seeking a fulltime Paraplanner to join our innovative and dynamic team. At Ameriprise Financial we help people feel confident about their financial future by providing comprehensive financial planning and investment consulting to families, individuals, and small organizations to help achieve financial goals and simplify their financial lives.

Job Purpose:

To partner with financial advisors in managing client’s financial plans and provide premium client service at an expert level. The main focus of this position is to lead financial planning process and support high net-worth client relationships including, meeting preparation, creating/running illustrations, proposing client recommendations and solutions, responding to client questions, and executing requested transactions/applications. In addition, this role can participate in investment research & portfolio construction. There are no sales requirements for this role

Responsibilities:

* Verify and analyze client data entry into financial planning software and tools – primarily Salesforce and NaviPlan
* Review and interpret financial statements sent in by clients
* Prepare preliminary financial planning recommendations for client meetings in regard to retirement, insurance, education funding, investment planning, cash flow, estate planning and other financial matters
* Use data from preliminary recommendations to create presentations for meetings using Excel and PowerPoint
* Attend and participate in client meetings; conduct client follow-up are after meetings
* Execute trades with documented direction from Advisor
* Respond to client questions and requests as needed
* Comply with regulatory, corporate, and practice guidelines

Qualifications:

* Bachelor’s degree
* Series 7, Series 66 and MN Life and Health required
* CFP not required but encouraged
* 5+ years of similar work experience in a professional office environment, ideally in the financial services industry
* Pleasant, professional and friendly manner with excellent interpersonal skills
* Strong team player
* Highly organized, accurate, and attention to detail
* Proven analytical and independent problem-solving skills
* Highly proficient with in Microsoft office including PowerPoint, Excel, Word and Outlook
* Experience with Salesforce
* Excellent written and verbal communication skills
* Ability to multi-task effectively
* Strong personal and business ethics and integrity

Salary and Benefits:

Compensation:$75-85,000annually; depending on experience

Benefits: Health, dental, and vision insurance assistance, PTO, 401k, disability and life insurance, subsidized financial plan

How to Apply:

Email or call Paul Bednarczyk

952-449-6690

Paul.Bednarczyk@AMPF.com

Please submit the following for consideration:

Cover letter

Resume

We are an Equal Opportunity Employer