Title of position: Paraplanner

Position type: Full-time

Location: Hybrid

Company name: FAOC, LLC

At FAOC, LLC, we seek to simplify clients' lives by helping them with their personal financial issues, providing independent advice, and offering educational tools. We do not sell financial products and do not receive commission or management fees.

General Job Description:

The Paraplanner position is a support-based role that works under the supervision of the Senior Financial Advisor to assist with back-office business operations that help increase workflow efficiency. Paraplanners will help support Financial Advisors with member services including Financial Plans and related reports. The role is competent in industry software and programs including eMoney, Salesforce, MS Office Suite, Google Suite, time-keeping systems, scheduling systems and other financial services programs. The position requires an individual who is a quick-learner, highly-organized, and capable of working individually and as a part of a team. FAOC clients rely strongly on the knowledge, skills, expertise and specialized training of our Financial Advisors, to support decision-making concerning life changes that can affect their financial freedom and future like marriage, having children, or short and long-term investing. The Paraplanner role fosters the collaborative and supportive professionalism that helps Financial Advisors and FAOC achieve organizational and member objectives.

The Paraplanner position does not require solicitation or sales.

The Paraplanner position may also or commonly be referred to as a Jr. Financial Planner or Jr. Financial Advisor. (It is entry-level position on the progressive career path for a Planner, which includes the Paraplanner position, the Financial Advisor position and the Sr. Financial Advisor position).

The role is a hybrid position requiring both onsite and remote work.

The Ideal Candidate:

The ideal candidate is highly-organized and detailed oriented and has the ability to work independently and as part of a team. They work well under pressure to meet objectives, deadlines, and changing priorities. The candidate has an exceptional understanding of math and finance with strong analytical and critical thinking skills. They have significant experience with MS Office Suite or a similar workspace and superior knowledge of spreadsheets, including Excel. An individual seeking to add value to our organization and draw from our empowering, inclusive, and growing culture is an ideal fit for this role.

Duties and responsibilities:

- Prepare automated financial plans and related reports
- Attend and assist with workshops, seminars and networking events as necessary
- Initiate client engagement and follow-up as necessary
- Use MS or Google Suite applications to draft or create Asset Management Proposals and other illustrations for Financial Advisor member presentations
- Proficient verbal and written communication skills
- Ability to create documents, run reports, and retrieve records necessary for compliance audits
- Meet with clients via video conference, phone or in-person to answer system-related questions, coordinate or schedule, or conduct follow-up
- Field inbound and outbound calls
- Attend meetings between Financial Advisors and clients as necessary or requested to assist with documentation
- Help organize, schedule, or coordinate private presentations between Financial Advisors and clients
- Manage workflow between financial advisor, team and client
- Inform appropriate management or roles concerning issues with client accounts that may expose the client or company to potential liability.
- Keen business acumen, including exceptional customer service, professional and courteous behavior, integrity, confidence, work ethic and confidentiality
- Maintain appropriate account records
- Prepare client pre-meeting documents such as meeting agendas, member paperwork, statements, asset allocations and post-meeting tasks including notes, and follow-up processes as necessary
- Understand and demonstrate proficiency with operational systems, procedures and practices
- Assist with or conduct market research and provide reports to Financial Advisors or others as necessary

Preferred credentials, experience and skills:

- Bachelor’s degree (Preferred)
- 1 years experience with financial services
- Familiarity with financial services tools like eMoney, Salesforce and Redtail
- Proficiency with Microsoft Office Suite, particularly Excel and PowerPoint

A bachelor's degree or higher in business administration, business management, finance, accounting, marketing, or related field, is Preferred

Any equivalent combination of experience, education, certification and/or training may substitute for requisite d egree or financial planning experience.

How to apply

Send your resume and cover letter to hr@faoncall.com

FAOC, LLC is an equal opportunity employer. All aspects of employment, including the decision to hire, promote, discipline, or discharge, will be based on merit, competence, performance, and business needs. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.

FAOC, LLC requires background checks and drug screens. Final candidates must complete a background check authorization form. Final offers of employment are contingent upon the successful completion and clear results of a background check and drug screen. ***In states that require an employment offer prior to conducting a background check, FAOC, LLC will request the completion of a background check authorization form at the time the offer of employment is extended.***

*Financial planning and financial advisory services offered by FAOC, LLC, a registered investment advisor (RIA). FAOC, LLC, is a wholly-owned subsidiary of Financial Advisor On Call, LLC, a fintech company offering educational services and record management support.