San Jose, CA- *Associate Planner*

- For a video position description click here: https://youtu.be/CVwxsuYxGZA
- Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are a wealth management firm in San Jose, CA that provides primary financial care to our clients, their businesses and their loved ones. We are seeking a Paraplanner to join our growing team and be responsible for providing general client and office support. You will work closely with key firm personnel to provide a superior client experience across the full spectrum of the client's financial life. Responsibilities are varied, but will include preparing and maintaining client files, preparing, implementing and reviewing recommendations. You may also be called upon to assist with administrative and support functions such as greeting clients, receiving and processing investment checks, scanning and maintaining client information, and completing applications and forms.

What you will get to do:

- Attend client meetings in a technical, supporting and learning role
- Assist in creation of financial plans, which includes data gathering and analysis, development of
  recommendations, implementation and ongoing portfolio management
- Track implementation of recommended wealth management strategies
- Potentially buy and sell investments for clients at the advisor's discretion
- Develop client relationships, which includes ongoing and regular client contact and communications
- Assist advisors and clients in completing application, enrollment and other forms as needed
- Provide client services to include planning updates, portfolio changes and reviews, information data gathering, portfolio returns and new opportunity identification
- Utilize proprietary and commercially available financial planning tools
- Complete special projects as needed

What we seek in a candidate:

- College degree from an accredited college or university in business or a related degree
- Minimum of two years working experience in the investment or financial planning industry
- Solid Internet research capabilities and strong personal computer skills (Microsoft Office Suite)
- Detail-oriented, organized and analytical with excellent written and verbal communication skills
- Strong interpersonal communication skills and ability to deal professionally with clients
- Experience using client relationship management (CRM) systems and databases
- A team player with strong leadership skills and ability to multitask and manage time effectively
- Ability to think through issues and problems from the client's perspective and offer solutions
- Willing to take responsibility for task completion and seek out ways to improve processes
- Ability to work independently and on a team
- Able to work within defined business processes
- Series 7 & 66 Licenses, CFP ® designation preferred

Position perks:

- Competitive salary
- Medical, Dental and Vision Insurance, 50% employer paid

- Life, LTD & STD insurance
- Paid vacation and holidays
- Sick Time Leave
- 401k and Roth 401k, with safe-harbor contributions
- Eligible for Employer Profit Sharing