



THE PLANNED APPROACH

Para-Planner Job Description

This Para-Planner Position offers the right applicant the opportunity to work in a casual, flexible environment. The right applicant will be responsible for assisting advisors develop financial plans and solutions for a small group of high net worth clients, completing client service work, and maintaining information systems.

This position has the opportunity for life long career and income growth with professional development support that can not be matched by the larger firms. The Planned Approach also promotes a generous work/life balance.

Ideal experience would be 1 to 5 years in financial services which could include financial planning, insurance, or the legal profession. Skills would include client service as well as database experience (Salesforce, preferred).

Important characteristics this person must possess are attention to detail, writing skills, a desire to learn, a “can do” attitude, a sense of humor, and above all, a dedication to the needs of our clients.

A degree in financial planning is a bonus, but not an absolute requirement.

If interested in this position, please send resume and cover letter to Stephanie Guerin 420 W 98. Street, Kansas City, Missouri or stephanie@theplannedapproach.com.

For questions call Stephanie Guerin at 816-941-0098, ext. 2.

Applications will be taken until March 31st, or until the right candidate is found.