CLAYTON
WEALTH PARTNERS

A Fee-Only Advisory Firm

Paraplanner

Education and Experience

- ✓ Bachelor’s Degree preferred; education in business, finance, financial planning or related field a plus
- ✓ Previous experience in financial services or related industry preferred
- ✓ Proficient with Microsoft Excel, Word & Powerpoint

Personal Characteristics

- Strong work ethic, initiative, ability and eagerness to learn
- Strong verbal and written communication skills
- Well organized and attentive to details
- Positive attitude
- Works collaboratively with all members of the firm
- Professional in attire and behavior
- Punctual with excellent time management skills
- Ability to multi-task and adhere to deadlines
- Exhibits ethical behavior in all relationships

Job Duties

- Supports Wealth Advisor team in multiple capacities which may change from time to time
- Enters data into CRM and assists with creating and updating workflows
- Gathers data and does basic data entry for financial plan preparation
- Assists Advisors with meeting preparation by verifying data and running basic reports
- Assists Advisors with meeting follow-up, as needed
- Completes financial planning related research, as needed or assigned
- Tracks client Required Minimum Distributions
- Administers and tracks client risk tolerance questionnaires
- Reviews tax returns for basic accuracy check
- Scans documents, as needed

Firm Development

- Willingness to develop systems and processes to improve productivity and efficiency
- Able to recommend methods of increasing and improving client communications and relationships

Professional Growth

* Accepts assignments that will further own education and ability
* Accepts responsibility for completing continuing education requirements, if applicable
* Demonstrates a willingness to learn new software and technology
* Willing to obtain professional designation, such as Financial Paraplanner Qualified Professional™, if appropriate

Promotion Guidelines (to Associate Wealth Advisor)

Obtain FINRA series 65 licensure
Demonstrates strong communication and analytic skills
Desires a more client-facing role and is willing to further education in financial planning
Displays an active interest and commitment to clients and to providing excellent service
Demonstrates commitment to personal growth, firm growth and professional growth

To apply, send resume and cover letter to Clint Patty at clint@claytonwealthpartners.com

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