



Financial Services Paraplanner

Job Summary

Berger Financial Group is seeking a Financial Services Paraplanner. As a Paraplanner, you are responsible for maintaining ongoing communications with clients, meeting preparation, creation of financial plans and other administrative tasks relating to clients. You are required to be extremely detail-oriented, accurate, organized, able to prioritize and must always exhibit excellent communications skills.

Duties, Responsibilities, and Attributes

- Maintain contact with clients to answer general questions about financial planning and investment(s) and allocation
- Ability to identify, meet and follow through with client needs and requirements
- All aspects of pre-client meeting activities such as scheduling, data gathering, preparation of meeting agendas, client paperwork, asset allocations and reporting.
- Prepare pre-meeting financial analyses for clients, including retirement, estate planning, education funding, portfolio rebalance, stock options, and risk management
- Post-client meeting tasks such as development of meeting notes, update of analyses, and coordination of planning implementation with other staff members and outside professionals as necessary
- Review portfolios for cash needs and for investing excess cash or liquidating for monthly distributions
- Prepare portfolio reports with the integration of outside account data, as needed
- Review cost basis and other account detail necessary for accurate reporting

Qualifications

- At least 3 years of financial services industry experience, preferably with some involvement in a similar role
- Ability to effectively present information and respond to questions from managers, clients, customers and the general public
- Excellent computer skills with advanced knowledge of the Microsoft Office Suite. Experience with financial planning software preferred.
- Ability to seek out solutions and solve problems
- Highly organized with a strong attention to detail and accuracy
- Willingness and ability to learn and use new technology
- Excellent written and verbal communications skills

Salary Ranges from \$40,000 to \$60,000 depending on the candidate.