Paraplanner – Burlington Vermont

Job Type: Full-time

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 be extremely detail-oriented, accurate, organized, able to prioritize and must always exhibit excellent communications skills. This role will require proficiency in all BFG software and the adoption of all firm-wide procedures.

Responsibilities:

- Maintain contact with clients to answer general questions about financial planning, 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 2 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 Salesforce and eMoney is also a plus.
- Ability to seek out solutions and solve problems
- Highly organized with a strong attention to detail and accuracy

- Willingness to cross train with other departments
- Willingness and ability to learn and use new technology
- Excellent written and verbal communications skills
- Ability to work in a fast-paced environment

Benefits:

- 401(k) and Roth 401(k)
- Employee Stock Ownership Plan (ESOP)
- Dental insurance
- Short-term Disability insurance
- Long-term Disability insurance
- Flexible schedule
- Flexible spending account
- Health insurance
- Life insurance
- Paid time off
- Professional development assistance
- Retirement plan
- Vision insurance

Schedule:

- Monday to Friday

Education:

- Bachelor's

Work Location:

- One location (Burlington, VT)

Submit resume and cover letter to info@bergerfinancial.com