

Paraplanner/Financial Assistant

The Financial Assistant enables the Financial Planner to focus on high-value planning, advising, and client relationship management by managing the day-to-day operations, data, and communications that keep the planning process organized and efficient.

Summary of responsibilities

The Paraplanner/Financial Assistant responsible for the support to the Wealth Manager.

- Interact daily with prospective and existing clients—via phone, email, and in person—with a professional, pleasant, and service-focused demeanor.
- Manage client transactions, including trades, money movement, and follow-up items.
- Support insurance new business processing and tracking.
- Assist with allocation management, cost basis management, and investment research.
- Prepare for client meetings by generating account allocations, combining and uploading review packets, and ensuring all materials are accurate and complete.
- Participate in client meetings and assist the Advisor with implementation of recommendations.
- Enter, maintain, and update client financial data in MoneyGuidePro; build and update financial plans and review client progress toward goals.
- Utilize financial planning and analysis tools including MoneyGuidePro, stock option software, and Social Security analysis tools.
- Maintain accurate client records including CRM updates (address, email, phone number changes).
- Proactively follow up on appointments, recommendations, service forms, and outstanding client communications.
- Stay current on industry developments, service and product enhancements, regulatory updates, and evolving client needs.

Qualifications:

- BA or BS in Business/Finance
- FINRA Series 7 and 63
- 2-3 years of experience working in industry
- Excellent knowledge of and ability to communicate financial planning concepts and terminology
- Excellent knowledge of and ability to explain products, such as mutual funds, stocks, bonds, insurance, and annuities
- Proficiency in computer programs, including MS Office Suite and other related financial planning applications
- A commitment to conduct business with honesty and integrity

Perks & Benefits:

- Full-time, 40-hour workweek.
- Competitive salary based on experience.
- Paid Time Off (PTO) and Holiday Pay.
- Opportunity for career growth into advanced financial planning.
- Company-wide celebrations and a positive team environment.

10801 Mastin Boulevard, Ste. 370 Overland Park, KS 66210 [p 913.563.7300](tel:913.563.7300) [f 800.441.9038](tel:800.441.9038) [w infin taskc.com](http://infin taskc.com)

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