

# Fig Marketing

## WHO WE ARE:

A Registered Investment Advisory Firm (RIA) with the Securities Exchange Commission (SEC). Our mission is to design and deliver customized financial plans as well as manage client portfolios to exceed our client's desired retirement goals.

## JOIN OUR TEAM TODAY!

We are expanding our operations to better service our growing client base. We have a Senior Paraplanner position available in our Knoxville, TN office. This is a full-time position reporting directly to our Operations Manager.

**YOUR ROLE:** The lead Paraplanner should support the Advisor and the Client Care Specialist in preparing all Client files with critical and pertinent financial planning information. They are also to lead the efforts in training and overseeing the Paraplanning team/s workflow, efficiencies, and quality. He will work well both independently and as a team member. They will provide guidance and insight to all Paraplanners.

## HOW YOU WILL MAKE AN IMPACT:

- Prepare financial summaries, analysis, and plans for Clients.
- Ensure files are prepared for Client Care Specialists and Advisor in advance of all Client meetings.
- Work with the Client Care Specialists to coordinate all paperwork needs and information for Client meetings.
- Follow-up on all action items in a timely and thorough manner.
- Research information as necessary on a case-by-case basis.
- Assist in maintaining files and incoming calls to ensure appropriate hand off.
- Maintain and update regularly and as needed all policies and procedures applicable to Paraplanning.
- Design and oversee the training and work of all Paraplanners.
- Assist other Paraplanners on file prep as necessary.

## WHY YOU ARE THE RIGHT PERSON:

- Bachelor's degree preferred
- Concentration in accounting, business, economics, or financial planning encouraged.
- FINRA Series 65, TN Life and Health Licenses preferred
- Five years + of experience in the finance industry

If interested, send your resume to [lori.miller@figmarketing.com](mailto:lori.miller@figmarketing.com)