Financial Planning Professional (Paraplanner)
El Segundo, CA

Summary

The Paraplanner is a critical contributor to our highly skilled team or professionals. It encompasses retirement, business, tax, bookkeeping, business management and estate planning for our high net worth clients. We are seeking an enthusiastic and results-oriented individual with a proven record of achieving goals and demonstrating expertise in wealth management analytics.

The ideal candidate will have:

- Developed comprehensive financial plans for high net worth clients covering protection planning, cash flow and debt management, investment strategies, college planning, income tax planning, retirement and estate planning.
- Highly proficient with E Money financial planning software to enter client data, calculate solutions and creatively explore options to implement comprehensive and situational plans.
- Highly proficient with both the Schwab and Fidelity platforms
- The ideal candidate should be self-motivated including having a curiosity for learning all things financial and the application to client and prospective client situations.
- This client facing position requires excellent verbal and written communication skills. System and process oriented, the individual will also be responsive as well as proactive to clients needs.
- The ability to work with a team of highly skilled professionals including taking direction, following through and motivation to grow within the firm professionally.

Requirements:

- 5 Years' experience in financial planning for high net worth clientele
- Bachelor's degree in finance, accounting, economics or similar
- Certified Financial Planner designation preferred
- CPA designation a plus but not required
- Proficiency with Fidelity or Schwab planning platform
- Strong technical and analytical skills
- Excellent verbal and written communication and organizational skills and keen attention to detail
- Proficiency using Excel, MSFT Office

Email your resume to daniel@runningpointcapital.com