

Innovative Financial Services Firm Seeks Paraplanner/Client Service Associate

[Rebalance IRA](#), a consumer-focused, mission-driven retirement investment firm with offices in Bethesda, MD and Palo Alto, CA, seeks a full-time client service/advice team member to support the investment planning process and work with clients to resolve issues as needed. Responsibilities include managing, gathering and analyzing client data, helping prepare preliminary financial plans and handling day-to-day client request and issues. Extra consideration will be given to those working towards a CFP designation as well as those with client facing experience. Work can be done remotely with participation in regular check-in calls and meetings near Sacramento (El Dorado Hills). Interested candidates should send an introductory email and resume to jobs@rebalance-ira.com.