

# Financial Planning Assistant

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**POSITION TITLE:** Financial Planning Assistant

PT/FT: full time

Hours: 40/week

**POSITION DESCRIPTION:**

Associate Financial Advisor - Paraplanner, near downtown Santa Rosa CA.

**Position overview:**

The chosen candidate will support two advisors in a successful Private Wealth Advisory Practice with day to day client service needs. This role is responsible for meeting preparation and follow up, communications with clients, money movement, business tracking, financial planning.

**Job duties:**

- o Confirm that client meeting agendas are accurate and ready for meetings
- o Complete input and accuracy of insurance details in agendas and software
- o Insert "special topic" slides into meeting agendas
- o Run and insert investment reports into meeting agendas
- o Insert annuity details into meeting agendas
- o Provide multiple reviews of Financial Plans as they are produced
- o Organize cloud based client folders and confirm accuracy and completion of data/filing
- o Confirm that clients receive meeting materials by upload, web ex, etc.

**Basic position details:**

- Full suite of benefits and vacation, including paid support of CFP designation
- Located in Santa Rosa California (travel of approximately 6 days per year to San Francisco)
- Ameriprise or financial advising experience is a plus
- Series 7 licensing preferred, however, we may sponsor the right candidate
- College degree required, preferably in business, finance or accounting
- Salary compensation competitively based upon experience and determined upon hiring, plus bonuses, profit sharing and 401(k) match

**\*\*Instructions for applying for this position\*\***

Resumes will not be accepted without a cover letter that says why you would be a good fit for this position and the compensation range you wish to discuss. Also in your cover letter, please briefly describe your three most defining characteristics or attributes. This exercise is meant to

show us your writing skills and ability to follow directions as well as to help us get to know you. Note that you must follow these exact instructions or your resume will be rejected.

**QUALIFICATIONS:**

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- Ameriprise or financial advising experience is a plus
- Series 7 licensing preferred, however, we may sponsor the right candidate
- College degree required, preferably in business, finance or accounting