PARADIGM ADVISORS

Client Operations Associate

Dallas, TX | Hybrid | Full-Time | SIE and Series 65 sponsored

Reports to: Director of Operations

Starting at $65,000, commensurate with experience; performance bonus

About Paradigm Advisors

Paradigm Advisors is an independent, fee-only registered investment advisory firm with offices in Dallas, TX, and Northwest Arkansas. This role is based in our Dallas office in a hybrid capacity.

We help thoughtful individuals and families make confident decisions about money, then build plans that can evolve as their lives happen. Our firm values preparation, clarity, accountability, and a high standard of service, both for our clients and for one another.

Where You Come In

This role suits you if you do your best work behind the scenes, enjoy owning processes, and take pride in accuracy and follow-through. You will work closely with senior leadership, with meaningful responsibility from day one and room to grow as the firm evolves.

Client & Advisor Support

- Schedule and coordinate client meetings, and prepare advisors with up-to-date information for each
- Act as a primary point of contact for routine client requests and follow-ups

Client Data & Documentation

- Request and organize client documents: bank and investment statements, tax returns, pay stubs, insurance policies
- Maintain complete, accurate client data across eMoney, CRM, custodial platforms, and document storage
- Monitor and update beneficiaries and trusted contacts on a regular basis

Operations & Workflow

- Complete authorization forms and coordinate access for insurance agents, CPAs, and attorneys
- Update tax letters and standardized client communications
- Document and improve client-facing and internal workflows

Who Thrives Here

- Experience in client service, operations, or administrative support; financial services preferred
- Accuracy is a habit rather than extra effort
- A preference for documenting activities and information rather than trusting memory
- Follow-through that leaves no loose ends
- Discretion with sensitive financial documents and confidential client information
- Clear, warm, professional communication in writing and in conversation
- Comfortable suggesting better ways to work

What Paradigm Offers You

- Direct access to and collaboration with senior leadership
- A supportive, team-oriented culture that values quality and accountability
- Opportunity to grow your skills and responsibilities as the firm evolves
- Commitment to work-life balance and long-term career development
- SIE and Series 65 sponsored and supported by the firm, including exam fees

How to Apply

Please use this exact subject line: **Client Operations Associate: Application**

Send to: **careers@paradigmadvisors.com**

Send your resume along with responses to both questions below.

- **Video, about two minutes:** Six things are open and three of them are urgent. Walk us through how you decide what moves first.
- **Written, a short paragraph:** Describe something you found that was nearly but not quite right. What made you look twice, and what happened next?

A video recorded on your phone works just fine. Send a link or attach the file. If video won't work for you, please let us know and we will do our best to provide an alternative.

Note: We review every application closely. We take note of applicants who follow these instructions carefully.

If you take pride in doing things the right way, and you would like your precision recognized and valued, we look forward to hearing from you.
