Paraplanner Job Description

We are seeking a Paraplanner for our fee-only firm located at our headquarters in State College, PA. This hybrid role will support the firm's Lead Advisors as well as the Operations Manager in managing existing and new client relationships. Over time we will play to your strong suits and have you focus in the area that most applies to your strengths and interests – either the Associate Advisor or the Client Service

If you don't have experience or a background in finance, that's okay, we can train you! Read on for more details to find out if you might be a match for us!

Job qualities needed (as described in various job duties):

Area One - Support Advisors and Clients:

• *Detail oriented* in that you will be responsible for coordinating implementation tasks with team members in both pre- and post-client meeting activities.

• *Communicates effectively* with clients and team members whether in person, in email or on the phone.

• *Time management skills* are necessary when getting ready for several meetings each day, preparing transfers or placing trades in a timely manner.

Area Two - Trading

• *Utilize critical thinking skills* in working on post meeting implementation tasks which includes trading and tracking future trades or transfers.

• *Organized* in making sure you have all the necessary information to make an informed decision while trading and gathering data from clients for meeting preparation or working on post meeting implementation tasks.

Area Three – Transfers of Assets

• *Independent worker* in gather data and paperwork and putting together a seamless operation of moving client's assets from one custodian to another.

• *Polite and clear phone manner* needed when anticipating or providing answers to clients' questions or talking to representatives from our custodians.

Other areas:

• *Team Player* with "no job is beneath me" attitude. Be willing to lend a hand with duties that smaller firms often take care of in-house.

• *Sincere willingness* to constantly learn and grow. Take the initiative to listen in on webinars, study for the Series 65 exam, and other areas of subject interest.

Responsibilities will include but are not limited to the following:

- Work with team members to ensure that all necessary preparations have been made for upcoming client meetings and calls
- Attend client meetings with Lead Advisors in a technical, supporting and learning role
- Coordinate with team for client follow up
- Gather and organize client data for meeting preparation
- Adhere to our firm's compliance manual and other rules and regulations as required by our firm and regulatory authorities

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Responsibilities Continued

• Work with financial planning software systems – eMoney, Morningstar, Fidelity Wealthscape, TIAA Advisor Services and TD Ameritrade's VEO, and Redtail (our CRM)

• Successful candidate will work towards Series 65 license and CFP® designation (company paid)

Education and Experience Requirements:

• Four Year Bachelor's degree is required.

• Proficiency with Microsoft Office suite, especially Excel is a must.

Benefits:

• Heath Insurance (company pays portion)

• SIMPLE IRA retirement plan with company match

• Paid vacation including having your birthday off!

• Competitive pay with year-end performance-based bonus. Initial compensation will be based on experience and qualifications of the specific candidate.

• 100% company paid education courses

• We offer company paid short term disability. Employee paid long term disability is offered as well.

What you can expect when applying:

• A response back that we are or are not interested at this time.

• If we are interested, we will proceed with a telephone interview

• If phone interview goes well, we will bring you in for an virtual interview

• If that goes well, we will be doing the following background checks/questionnaires:

Reference checks

Criminal background checks

Credit check

Kolbe questionnaire

• If those all check out, then a second interview will follow where you meet with each of our team members, pending covid-19 restrictions. It is important that our next hire fits in with our company culture.

• Formal written employment offer is then given to final candidate.

Interested candidates should send a cover letter and resume to Jennifer Anderson, Business Manager at jennifer@mcclarren.com. No phone calls or drop ins please!

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Mission Statement: McClarren Financial Advisors provides peace of mind through collaborative fee-only fiduciary relationships for optimistic people who want to advance their personal and financial goals.