PARAPLANNER

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team of eleven operates across two business segments: Wealth Management and Asset Management. We are currently looking for a Paraplanner to join our Wealth Management division and contribute to our continued growth and success.

JOB SUMMARY

As a Paraplanner, you will be a part of the firm's Wealth Management team. This position is onsite, located at our Guilford, CT office. As an entry-level role, it represents the initial step in our developmental program, designed to set you on a path toward becoming a Wealth Advisor and achieving Certified Financial Planner™ (CFP®) certification.

In this role, you will focus on developing an expertise in client service responsibilities, building trusted relationships with clients, refining your communication skills, and obtaining the Financial Paraplanner Qualified Professional™ (FPQP®) designation.

Successful completion of these objectives will make you eligible for consideration for the Associate Wealth Advisor role and allow you to start working toward the CFP® designation.

As a Paraplanner, you will support the firm's Wealth Advisors in the financial planning process and assist with CRM tasks. Additionally, your responsibilities will include responding to client inquiries, managing client onboarding and account maintenance, and developing strong relationships with our custodians.

KEY ACCOUNTABILITIES

- Provide service to clients professionally and respond to regular inquires in a timely manner
- Shadow and support firm Wealth Advisors throughout the Financial Planning process
- Assist in management of our CRM Software
- Ensure conformance with firm policies and standards
- Support office maintenance tasks and work in a collaborative team environment
- Achieve FPQP® designation in preparation for potential Associate Wealth Advisor role

QUALIFICATIONS

- Highly organized with exceptional attention to detail and the ability to support multiple advisors
- Responsive and effective communicator, both verbally and in writing
- Possess strong ethics, with the ability and dedication to maintain high confidentiality of personally identifiable client and firm information
- Have the emotional intelligence and self-awareness to develop an effective working relationship with our team and to serve a diverse client base successfully
- Eager to learn about the industry and our firm, thriving in a fast-paced, hands-on environment
- Tech-savvy with the ability to quickly learn new tools, platforms, and software
- Capable of working both independently and as part of a team
- Flexible and adaptable to tight deadlines and evolving client needs

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Entry-level
- BA/BS degree
- Proficient in Microsoft Office
- Minimum GPA of 3.0
- Must have Series 65 or pass within the first 6 months of employment

HOW TO APPLY

For further inquiry, please email **benjamin.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.