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.

You will support the firm's Wealth Advisors in the financial planning process and assist with CRM tasks. Your responsibilities will also include preparing materials for client meetings, participating in those meetings, and maintaining strong client relationships through ongoing support and timely follow-ups on action items.

KEY ACCOUNTABILITIES

- Provide excellent client service by responding to inquiries, addressing concerns, and ensuring timely communication.
- Shadow and support Wealth Advisors throughout the Financial Planning process, assisting in developing and reviewing client plans.
- Support advisor team with client onboarding by helping to collect and organize necessary documents, including tax returns, account statements, and legal documents.
- Manage CRM software to keep client records accurate, organized, and up to date.
- Ensure compliance with firm policies, industry regulations, and standards in all financial planning activities.
- Prepare materials for client meetings to ensure that all documents and reports are accurate and ready for client discussions.
- Participate in client meetings by taking notes, tracking action items, and assisting in discussing financial strategies or next steps.
- Maintain client relationships by providing ongoing support and following up on action items related to financial plans.
- Develop a cohesive relationship with asset management and the client service teams to ensure smooth workflow and efficient service.
- Stay informed on industry trends and regulatory changes to ensure the firm's practices remain up-to-date and compliant.

QUALIFICATIONS

- Highly organized and detail-oriented, able to manage multiple tasks and support several advisors effectively.
- Responsive and effective communicator, both verbally and in writing.
- Uphold strong ethical standards with a steadfast commitment to maintaining the confidentiality of sensitive client and firm information.
- Emotionally intelligent and self-aware, skilled in building effective relationships with team members and serving a diverse client base.
- Eager to learn and grow within the industry and the firm, thriving in a dynamic, fast-paced environment.
- Tech-savvy, quick to learn new tools, platforms, and financial software.
- Able to work independently while also collaborating effectively as part of a team.
- Flexible and adaptable, able to meet tight deadlines and adjust to changing 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 **madelyn.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.