

Assistant Paraplanner

Company Description

AMJ Financial Wealth Management (AMJ WM), an independent wealth management firm, is a 15+ year old boutique wealth management firm providing clients with both portfolio management and financial planning. We work with high net worth families, small business owners, and women in transition. Our firm's mission is to first seek to understand what success means to our clients, and then through superior advice and client services, provide them with a path to create their success.

Job Qualities:

- Strong desire to serve clients
- Ability to multi-task
- Likes a fast-paced environment
- Detail-oriented
- Strong organizational and communication skills
- Ability to prioritize tasks
- Strong listening skills
- Reliable and follows through
- Likes being part of a team

Job Responsibilities:

- Provide outstanding service to AMJ WM clients in responding to client requests
- Assist Lead Financial Advisor to develop client financial plans
- Manage database input for multiple software systems
- Generate and prepare account forms, as necessary
- Set up and maintain accounts in software systems (CRM, etc.)
- Maintain client investment advisory contracts
- Participate in all team meetings and training
- Assist with phone coverage, as needed

Education:

- Bachelor's degree, preferably a Certified Financial Planner or CFP candidate
- Technology: knowledge of MoneyGuidePro, Redtail, Advent Black Diamond, MS Office

If you are looking to grow within the Wealth Management industry, we offer a great working environment, salary and benefits (Support for CFP accreditation, 100% Employee paid Health Insurance, 3% company contribution to 401k, PTO, etc.), as well as strong career path toward Financial Planning or Advisory track. Please send resume to bbender@amjfinancial.com. In the subject line, please include the job description name.