**Client Service Associate / Paraplanner**

**Position Summary**

Gold Family Wealth’s Client Service Associate / Paraplanner will support the team in the preparation, presentation, and implementation of financial plans for clients and prospects of the firm. Duties will include managing financial planning software, gathering and entering sensitive financial information from clients and prospects into financial planning software, developing planning techniques, preparing plan presentations and reports, and performing necessary research on unusual and sophisticated scenarios.

The ideal Client Service Associate / Paraplanner will unify the planning side of our business with the operations side by effectively communicating and translating a clients goals and advisor’s vision into a tangible financial plan. The Client Service Associate / Paraplanner will play an integral role in the growth of Gold Family Wealth, and as such, should come to the table with a drive for professional growth, strong organizational skills and hustle.

**Essential Job Functions**

* Primary focus is supporting the Gold Family Wealth advisors with financial plan preparation and implementation
* Work with Wealth Advisors to gain an understanding of our wealth planning client's background and objectives
* Gather and prepare data for client reviews
* Update financial plans, as necessary, to maintain reliable and current information
* Review and modify systems to enhance the financial planning experience
* Research complex financial planning issues and topics and present findings
* Strive toward complete mastery of the DAT, MoneyGuide Pro, CEO, and Salesforce
* Service client needs and requirements as determined through Client Service Manager coordination
* Maintain accurate and complete client information in the database
* Interact with advisors and broader operations team on financial planning follow up and subsequent onboarding
* Develop and maintain written procedures of all activities; we’re looking for someone to “own” this process and help us uncover inefficiencies
* Attend all training and information sharing meetings scheduled for the Service team
* Adhere to all company and industry supervisory guidelines and policies

**Knowledge, Skills, and Abilities**

* Knowledge of Wealth Advisor office tools (i.e. Orion, SalesForce, etc.) preferred
* Knowledge of Microsoft Office, including Word, Excel, and Outlook required
* Excellent interpersonal & communication skills
* Excellent attitude and an extraordinary client service orientation
* A genuine interest in serving and caring for other people
* Excellent organizational and time management skills
* Ability to handle multiple tasks with precision
* Analytical and research skills
* Ability to troubleshoot and problem solve
* Desire to provide the highest quality of service
* High level of attention to detail

**Preferred Education and Experience**

* Bachelor’s degree in business administration, accounting, finance, or similar field preferred or commensurate career experience
* Experience working in a professional office environment preferred
* 1-3 years of experience in the financial industry preferred