Paraplanner / Financial Planning Associate

Company Description
Kane Company Wealth Management is a top tier boutique, fee-only wealth management firm that provides comprehensive financial planning, investment management, and tax preparation services to its clients.

Role Description
We are seeking to fill a Paraplanner / Financial Planning Associate position within our firm in which will work alongside our wealth managers, financial planners, tax preparers, and operations staff to provide support and to assist in various financial planning and tax related items, along with accurately preparing documents required to open and maintain client accounts.
We are looking for high performers that will handle high volume, complex work with a low error rate and embody the Kane Company culture.

Job Duties

Operations –
- Accurately prepares, processes and tracks paperwork for new and existing clients
- Input various client information into our Customer Relationship Management software (Advyzon)
- Correctly process distributions to clients
- Prepares, sends and manages online access information for clients
- Researches and resolves account related issues in a timely manner
- Communicates with all custodians that we work with (Charles Schwab and Altruist)

Financial Planning –
- Input various client information into our financial planning software (RightCapital)
- Assists with taking clients through various risk tolerance questionnaires (Advyzon and Nitrogen)
- Sits in on client meeting to assist with taking notes and answering various client questions

Tax –
- Input various client information into our tax preparation

(CCH Axcess)
- and tax planning (Holistiplan / FP Alpha) softwares

General –
- Successfully prioritizes and juggles multiple tasks with competing priorities
- Delivers quality customer service
- Consistently display strong communication skills, both written and oral
- Must remain calm under pressure, be a good listener and be able to make good business decisions considering impact to client and firm
- Ensure compliance with all regulatory guidelines
- Consistently meets or exceeds deadlines
- Works well independently and within a team environment with minimal supervision
- Exemplifies Kane Company Wealth Management’s culture and values
- All other duties as assigned

Required Qualifications

- Bachelor’s degree in Financial Planning, Finance, Accounting, Business, Mathematics, Economics or another similar track
- Earn at least the FPQP or Series 65 license within 6 months of hire*
- Strong organizational and time management skills
- Prior experience in financial services field
- Proficient in Microsoft applications (Word, Excel)
- Meticulous attention to detail and accuracy

*Curriculum, textbooks, and exam fees eligible for reimbursement upon successful completion within 6-months from initial hire date

Preferred Qualifications

- FPQP / CFP / EA / CPA and / or Series 65 license
- 2+ years of professional financial planning experience

General Qualifications

- Financial Planning and Finance skills
- Strong Analytical Skills
- Experience with Investments
- Report Writing proficiency
- Excellent communication and interpersonal skills
- Detail-oriented and organized
- Bachelor's degree in Finance, Economics, or related field
- Certification in financial planning is a plus

Featured Benefits

- Health Insurance
- Dental Insurance
- Life Insurance
- SIMPLE IRA Match
- Professional Development / Internal Growth Opportunities