PARAGON
WEALTH STRATEGIES

Support Advisor / Paraplanner

Paragon Wealth Strategies is a FEE-ONLY RIA firm looking for a Support Advisor or Paraplanner who wants a great job taking good care of our team and our clients, with NO sales pressure.

POSITION SUMMARY AND ESSENTIAL FUNCTIONS:

Support Financial Advisor or Paraplanner to work in a team environment, in a supporting role to Senior Financial Planners. Has responsibility for data gathering, modeling, case design, scenario building, and plan and presentation development. This individual may eventually meet with clients as part of a team during appointments. Provide a high level of client service in order to facilitate continued growth of the firm by retaining ideal clients through outstanding client service and technical expertise.

REQUIRED SKILLS AND EXPERIENCE:

- Bachelor's Degree or in active pursuit to complete degree
- CFP® certification ideal, but not required
- 1+ years' experience as a practicing financial advisor ideal, but not required
- Series 65 or 66 ideal, but not required
- Strong verbal and written communication skills
- Strong ability to analyze problems and create solutions independently
- Motivated naturally to provide excellent client service
- Strong attention to detail and thoroughness
- Able to perform multiple tasks efficiently
- Strong comfort level with computers and software
- Team player with uncompromising integrity and loyalty
- Comfortable working in a fast-paced environment
- Flexible and comfortable adapting to change
- Background checks with satisfactory results required: criminal, credit, and drug screening

COMPENSATION AND BENEFITS:

Ideally this is a full-time position, but part-time opportunities will be considered at 25+ hours per week. Compensation will be based on experience, skills, and credentials, but is expected to be in the $45-55K range (full-time). Additional benefits include 401k with 10% match, bonus incentive plan, long-term disability insurance, and cost-sharing for health care (we do not have a group plan). Career progression opportunities are available over time for employees that demonstrate success. Our role is free of sales pressure because we have robust marketing systems and do not need our advisors to prospect or network for leads.

To apply, please email resume to Michelle Ash at michelle.ash@wealthguards.com