

JOB DESCRIPTION

Title: Paraplanner

Status: Full-time salaried

Reports to: Director of Operations of Client Service Team

About Summit

Summit Financial Strategies, Inc. is an independent, fee-only wealth management firm offering financial planning and investment advice to 600+ families. Operating since 1995, Summit manages nearly \$1 billion in client assets. While some RIA firms focus on numbers, we at Summit focus on the people who make the numbers happen. So, we're always on the lookout for talented and motivated individuals who want to learn, grow, and be part of an exciting, forward-looking organization. We are well-established and growing, and known for our openness to new ideas and approaches. We actively encourage our clients and associates to suggest ways to improve our service delivery and operations—and make our firm an even better place to work. We can help move your career from now to next.

Job Summary

The *Paraplanner* supports the lead advisor in the delivery of client services of the firm. The *Paraplanner* is an entry level position into the Advisor career path.

Duties and Responsibilities

The *Paraplanner* position will focus in the following areas:

- Client Service
 - Coordinate with team members to provide consistent, effective client support and service
 - Ensure timely follow up to client requests and act as point of contact when lead advisor is unavailable
 - Prepare financial statements and portfolio performance reports
 - Input basic tax data for income tax projections
 - Input basic data for cash flow and long-term retirement projections
 - Basic understanding of the financial planning process
- Strive to increase personal and professional development
 - Candidate will be expected to enroll in the CERTIFIED FINANCIAL PLANNER™ certification program after one year with the firm

- Support the long-term strategic plan and vision of the firm
 - Adheres to firm’s Core Values, Ground Rules, and Mission Statement
 - Utilize skillset on one of our firm’s committees
 - Be viewed as a team player by associates
 - Treat all associates with a high level of respect

Qualifications

The *Paraplanner* position typically requires the following qualifications:

- Bachelor’s Degree from an accredited college or university (preferably in Financial Planning, Business, Accounting, Finance, or related field)
- Proficiency with Microsoft Office Word, Excel, and Outlook required
- Problem-solving ability, thoroughness, cautiousness, attention to detail
- Strong written and verbal communication skills
- Team player, professional, respectful in interactions with associates and clients
- Takes initiative to research and resolve issues
- Strict confidentiality of clients’ information is a must
- Demonstrated competency in financial planning, financial analysis, and investment research and strategies
- Demonstrated ability to work independently, meet deadlines, and proactively address opportunities and needs

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary rate based on experience
- Bonus
- Benefits include health insurance and 401(k) plan
- Financial support for professional accreditation/continuing education requirements and other education/training opportunities

How to Apply

This position is open immediately and until filled. Interested applicants should send their resumes and salary requirements with a cover letter to Summit Financial Strategies, Inc., 7965 North High Street, Suite 350, Columbus, OH 43235 or clientservices@summitfin.com. No phone calls please.

Summit Financial Strategies, Inc. is an Equal Opportunity Employer

www.summitfin.com