CLIENT SERVICE ASSOCIATE/PARAPLANNER

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of eight separated across three business segments: Wealth Management, Asset Management, and Trust Services. We are currently seeking a Client Service Associate/Paraplanner to join our growing Wealth Management division.

JOB SUMMARY

The Client Service Associate/Paraplanner will be a part of the firm's Wealth Management Developmental Program. The main objective of the program is to establish a long-term career trajectory with the goal to become a Certified Financial Planner™ (CFP®).

A Client Service Associate/Paraplanner will be expected to develop an expertise in client service responsibilities, create a trusted relationship with our client base, develop effective client communication skills, and become a Financial Paraplanner Qualified Professional (SM) (FPQP®).

If an individual successfully achieves all these goals, they will qualify to become an Associate Wealth Advisor and begin the study process toward achieving Certified Financial Planner™ (CFP®) designation.

Client Service Associate responsibilities will include supporting the firm's Wealth Advisors by responding to client inquiries, completing client onboarding and account maintenance tasks, and developing quality relationships with our custodians.

Paraplanner responsibilities will include supporting the firm's Wealth Advisors during the Financial Planning process and assisting with Salentica CRM responsibilities.

KEY ACCOUNTABILITIES

- Provide service to clients professionally and respond to regular inquires in a timely manner.
- Shadow and support firm Wealth Advisors throughout the Financial Planning process
- Assist in management of client CRM Software
- Ensure conformance with firm policies and standards
- Support office maintenance tasks and work in a collaborative team environment
- Achieve FPQP® designation in preparation for potential Associate Wealth Advisor role

QUALIFICATIONS

- Well organized, with extraordinary attention to detail and the ability to support multiple advisors
- Are responsive and effective communicators, verbally, and in writing
- Possess strong ethics, with the ability and dedication to maintain high confidentiality of personally identifiable client and firm information.
- Have the emotional intelligence and self-awareness to develop an effective working relationship with our team and to successfully serve a diverse client base.
- Are eager to learn about the industry and our firm and enjoy working in a fast-paced, hands-on environment
- Are tech savvy, with the proficiency to quickly learn new technology tools, platforms, and software.
- Ability to work in teams or individually, and be flexible to work under tight deadlines and changing client needs

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- BA/BS degree
- Proficient in Microsoft Office

HOW TO APPLY

For further inquiry, please email **benjamin.monte@montefinancialgroup.com** with an attachment of your resume.

For additional company information you may find us on **LinkedIn** or our **Website**

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.