

Skybox Financial Group Job Description

Job Title: Paraplanner Internship

Company Overview:

At Skybox Financial Group, we are committed to fulfilling our mission to provide outstanding experience, peace of mind, and customized solutions to protect what our clients have today, grow for the future, and reduce their lifetime tax liability.

General Summary of Duties and Responsibilities:

The purpose of this internship position is to support the Lead Advisor(s) in the financial planning workflow. The Paraplanner is primarily responsible for the preparation of financial plans, proposals, and presentations for client meetings with guidance from the Financial Advisor. Key duties for this role include comparing existing solutions to current marketplace possibilities, conducting a risk analysis based on the client's risk tolerance, maintaining client files, preparing client correspondence, and assisting in client meetings when necessary. While delivering excellent customer service, the Paraplanner may interact with prospects and clients as needed. This is a great learning opportunity that could lead to a full-time position.

Job Duties:

- Utilize fact finder and client notes from Advisor to obtain client information
- Utilize websites and software to obtain any client and product information
- Using client information, comparing existing solutions to those currently available in the marketplace, and performing risk analysis
- Prepare financial plans and proposals for client meetings
- Prepare charts, graphs, tables, and other visual aids as needed for Advisor presentation to the client
- Record notes in the client folder and database
- Email Advisor a status at the end of each day

Knowledge, Skills, and Abilities:

- Knowledge of key financial, investment, and risk management concepts
- Highly organized with strong follow-through
- Ability to prioritize day-to-day tasks and issues
- Resourceful in problem resolution
- Operate with a proactive approach when dealing with Advisor and clients
- Experience working in a fast-paced environment
- Demonstrates persistence to achieve quality

- Preferred Finance Major and Senior year of program
- Internship would last through the 2024-25 school year