

Position: Paraplanner/Junior Financial Planner
Full-time
Competitive salary and benefits package
Start date: Immediate

Description of Company: Since 1991, Capital Advisors, Ltd. has been dedicated to providing financial planning/wealth management services to successful individuals and family business owners. Our holistic, objective, solutions-oriented approach to financial planning has earned us the trust of our clients and the respect of our peers and other professionals. We develop gratifying bonds with our clients which reach beyond the traditional client/advisor relationship. We have experienced solid, consistent growth, an exceptional client retention rate, and receive consistent referrals due to our reputation. We have a culture of collaboration and an atmosphere which inspired professional growth. Our staff's average tenure is over 16 years.

Responsibilities: You will work in teams with Lead Advisors providing case management for clients, incorporating analysis and preparation of financial planning reports including portfolio reviews, investment planning, cash flow planning, estate planning and risk management. You will be an active participant in client meetings and will be a participating member of the Investment Policy Committee. The position affords the opportunity to develop into a Lead Advisor.

Skills & Qualifications: Career-oriented individual who is committed to excellence and is passionate about developing a career with a pre-eminent financial planning firm.

Required

- Minimum 3-5 years of experience in the financial services industry and a bachelor's degree.
- Proficient in Excel and other Microsoft Office applications.
- Excellent organizational, oral, and written communication skills.

Preferred

- CFP® or CFP® candidate
- Securities licensed (Series 7)
- Experience with portfolio reporting systems such as Orion and research programs such as Morningstar.

Work Perks:

- Competitive salary + bonus opportunity
- Medical and Dental insurance options
- 401(k) Profit Sharing Plan
- Paid Holidays and PTO
- Paid study/classes for applicable advanced credentials
- Paid continuing education
- Paid credential and license renewals
- Remote work one day per week
- Kitchen stocked with coffee, tea, sodas, juice, snacks, etc.
- Monthly in office massotherapy

Interested candidates should email Rob Holub at rholub@capitaladvisorsltd.com