FINANCIAL PLANNING FORT COLLINS

Learn – Prepare – Act – Collaborate

Paraplanner

Financial Planning Fort Collins
375 E. Horsetooth Rd
Bldg. 3. Ste. 203
Fort Collins, CO 80525

About This Position

We are now hiring for the next member of our quickly growing team. Our newest role focuses on both client-facing and analytical/administrative duties in a highly collaborative, dynamic environment.

- Do what you enjoy and enjoy what you do in our lifestyle enterprise.
- Our local office is available to you but is not your required workspace.
- Work from anywhere and find work-life balance at our modern financial planning practice.
- Become our internal expert in this role or see it as the launching point to become one of our lead planners by leveraging our professional education benefits.

About Our Firm

At Financial Planning Fort Collins, we're full-time fiduciaries who excel at working with people facing what we call "critical money moments." Because we focus on these life-defining situations, our purpose-built process and fee-only service model brings simplicity to the complex and overwhelming.

With over 30 years of combined experience in financial planning, tax preparation, and investment management, our specialists and CERTIFIED FINANCIAL PLANNER™ pros are ready to help you excel in your career.

We love what we do, and we think you will, too.

Role and Responsibilities

As a small team, we all wear many hats. Each member of the team will contribute to "onstage" client-facing activities as well as "backstage" administrative responsibilities.

▶ Financial-Planning-Related Duties

- Engage with clients directly to help us provide a consistently superior client experience.
- Input and analyze client data to run initial financial planning projections.
- Add to and enhance our robust pool of content and client deliverables.
- Be our spreadsheet whiz, enhancing our data-driven analyses.
- Update our Client Service Manual to keep up with and document our ever-improving client service process.

▶ Operations Duties

- Support and guide our team to keep us running like a well-oiled machine.
- Direct communications from our clients to our team of advisors and specialists.
- Serve as our go-to paperwork pro.
- Manage our cloud-based file system.
- Keep our physical office in tip-top shape and keep us caffeinated by ordering supplies when needed.

Qualifications, Education, Skills

The following competencies will give you a head start in our vetting process.

- Bachelor's degree (in finance or related field = even better!)
- Prior work/experience in personal finance
- Self-driven and self-starting adult
- Customer service experience
- Strong interpersonal skills (verbal and written)
- Highly proficient technology skills
- Ability to remain discreet and keep private information private
- Ability to adjust to changing priorities, get back on track after frequent interruptions, and stick to deadlines
- Corny joke appreciation and/or tolerance

Our Tech Stack

We use the following apps and tools, and we will train the right individual as needed. Bonus points if you're already familiar with any of the stuff below!

> Acuity Scheduling, Adobe Acrobat, Betterment for Advisors, DataPoints, DocuSign, Google Workspace, Loom, Mailchimp, MyRepChat, Orion, QuickBooks Online, RightCapital, RingCentral, Riskalyze, Salesforce, Sfax, ShareFile, Tawk.To, TD Ameritrade Veo One, Teachable, WordPress, and Zoom.

Compensation

This is a full-time salaried (W-2) position eligible for our listed benefits.

Annual Salary

> $35,000 - $40,000 *plus* quarterly bonus of up to 20%

Benefits

Financial Planning Fort Collins offers all employees:

- 401(k) with 100% match up to 5%
- Health, Dental, and Vision insurance
  - In our small group plan FPFoCo covers 50% of premiums for employees and 33% for spouse or domestic partner and/or dependant(s)
  - Health savings account (HSA) contributions through payroll deduction also available
- Short- and long-term disability insurance
  - Available through NAPFA as a member employee
- Life insurance
  - Available through NAPFA as a member employee
- Paid holidays
- Generous and flexible paid vacation time
- Employee ownership program
- Professional certification/education reimbursement (got CFP®?)
- Professional development: Love networking and attending industry events? We'll send you to up to two conferences in the contiguous U.S. each year

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To apply, send your cover letter/video and resume to Dan Andrews (he/him) at dan@fpfoco.com. We are currently reviewing applications for this position.