

Job Summary

Scarborough Capital Management provides active investment management and financial advisory services for approximately 4,000 clients around the country. We have an immediate opening for a career oriented Paraplanner/Advisor Assistant.

Candidate must be extremely professional in appearance and manner, willing to accept direction, quick to learn new things, customer service oriented, and computer savvy.

Working hours are 8:30am to 5:00pm, Monday through Friday.

We provide a team environment with great pay and benefits.

Duties and Responsibilities

The Paraplanner/Advisor Assistant can expect to focus in the following areas:

- Perform general administrative and support functions for senior financial advisor.
- Work with senior financial advisor to prepare comprehensive and modular financial plans.
- Schedule and potentially participate in client meetings, phone calls and handle follow-ups.
- Prepare performance reports and appraisals.
- Organize, coordinate and maintain client paperwork.
- Handle routine matters for client accounts.
- Research and resolve client service problems or errors as needed.
- Maintain CRM systems
- Use database information for mailings and reports
- Coordinate client communications via tools such as Constant Contact and GoToMeeting
- Letter writing, mail merge, automating tasks using CRM
- Assist in event planning, marketing and development of seminar materials
- Perform miscellaneous tasks as assigned

Qualifications

The Paraplanner/Advisor Assistant position typically requires the following qualifications:

- 1-3 years experience in investment management and/or financial advisory services strongly preferred.
- Bachelor's Degree in business related major.
- Series 7, 65 or other securities licenses a plus.
- CFP a plus.
- Proficiency in Word, Excel and Outlook
- Detail-oriented, accurate, organized, able to set priorities
- Strong communication skills
- Self-starter, takes initiative
- Team player
- Desire/ability to work successfully in a small company environment

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience (Range \$35k-45k) and ideal candidate will grow into additional responsibilities and compensation.
- Benefits include dental, vision, health care, 401(k)
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Scarborough Capital Management is an Equal Opportunity Employer

Job Type: Full-time

Salary: \$35,000.00 to \$45,000.00 /year