

Job Title: Paraplanner
Status: Full-Time
Relevant Work Experience: 1+ years preferred
Job Category: Financial Services

Berman McAleer is a premier wealth management firm, empowering families to make sound financial decisions and creating confidence through long-standing client partnership. In 2018 and 2019, we received #1 in our category in *InvestmentNews'* Best Places to Work for Financial Advisers award.*

Our philosophy is to provide every client with outstanding service and thorough advice. Our firm takes pride in having a knowledgeable, capable, and friendly staff of professionals, able to assist our clients in every way possible. Berman McAleer was founded on the belief that the interests of our clients must always come first. We strive to provide each client with the information and guidance necessary to make sound and informed financial decisions. The core values of Respect, Fulfillment and Trust guide our interaction with our clients, as well as, with all the members of Berman McAleer in our corporate team structure.

This position's primary duty will be to provide comprehensive support to the financial planning department by working with the advisors on financial plans.

Responsibilities -

- Support the Director of Planning with analysis, client service and technical assistance
- Prepare and update financial plans
- Provide support on financial planning software to staff as needed
- Prepare charts, graphs, tables, and other visual aids to be used in client meetings
- Work with insurance department to obtain quotes as needed
- Answer and/or research questions posed by the advisors of the firm

Qualifications –

The ideal candidate will have a college degree in finance or economics. In addition, the candidate will be currently working to obtain the CFP designation and/or looking to make financial service a career path. Having the ability to handle **details** and follow-through on requests is imperative.

Benefits –

A robust benefits package, a supportive and professional environment, a salary commensurate with your experience and a real opportunity for professional development.

- ◆ Health, Dental & Vision
- ◆ 401K
- ◆ LTD, Life Insurance
- ◆ Open Paid Time Off (OPTO)