Soesbe FINANCIAL

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Paraplanner & Administrative Assistant

Soesbe Financial is a rapidly growing, privately-owned boutique firm focused on fee-only personal financial planning and investment management for high net worth individuals. Our passion is helping people improve their lives; we do this by bringing clarity to our client's finances and helping guide their decisions about money.

We are seeking a full-time Paraplanner and Administrative Assistant to support our specialized financial planning services. This position is a great opportunity for someone who is newer to the financial planning field. The ideal candidate will be comfortable with analyzing and consolidating client data and is able to work collaboratively with the planner to prepare accurate and informative meeting materials for clients. While the Paraplanner will have contact with clients, this a not a direct client-facing position, and the person in this role will not be delivering advice.

For the ideal candidate, the Administrative Assistant responsibilities will drop off after one year. The Paraplanner duties will increase, and there will be an opportunity for future growth into an Associate Planner role.

Tasks may include:

- Assist in meeting preparation and post-meeting follow-up
- Prepare agendas and reports for client meetings
- Sit in on client meetings to observe and take notes
- Maintain all tasks in CRM and assist planner with closing tasks
- Update financial planning software with client financial data
- Communicate with clients via phone, video and/or email, as required
- Collect needed documents from clients and follow up as required
- Prepare IMS-related forms for client signature
- Submit and follow up on IMS forms, assist in troubleshooting NIGOs
- Keep client up-to-date on the progress of new account opening and account transfers
- Assist in the preparation of quarterly IMS reports
- Connect new accounts with our tech stack and keep updated
- Confirm trades that have been placed
- Assist with other financial planning client service, research, and operational tasks as needed
- Document processes and assist in improving efficiency of office procedures
- Assist in the client onboarding process
- Add new clients to financial planning software, send client portal access invitations

- Update CRM with new client info and maintain CRM database
- Prepare client agreements for signature (in-person or via DocuSign) and verify completion
- Download (or scan) and organize client documents
- Schedule client meetings as required
- Answer phone and interact with clients who drop by as needed
- Participate in our work as a team, including quarterly goal setting, weekly staff meetings and annual retreat
- Be willing to work within the EOS framework and adhere to our core values and core focus

Requirements:

- College diploma, preferably in Financial Planning or Finance-related
- Interest in a career in the Financial Planning field
- Minimum two years related work in office environment
- Attention to detail with both written and numeric information
- Strong verbal and written communication.
- Ability to precisely follow written and verbal instructions and procedures in English
- High level of proficiency using Microsoft Office (particularly Excel) and ability to learn new technology quickly
- Experience with eMoney, Orion, Veo One, iRebal, and/or Wealthbox a plus
- Able to work independently and in a small-office environment
- Strict adherence to company privacy policy and other security procedures
- Mature, reliable, punctual, team player
- Drug and background screening required upon acceptance of any offer and before beginning employment

Details:

- 40 hours per week, flexible schedule during normal business hours (M-F, 9-6)
- Annual starting salary $60,000 - $65,000, depending on experience, skills and abilities
- Potential bonuses for annual achievement of company goals, attainment of CFP® credential, and other performance-related objectives
- Two weeks annual PTO and 10 paid holidays per year

Location: Soesbe Financial, 5250 Elvas Ave, Sacramento, CA 95819
This position is in-office and is not eligible for remote work at this time

Soesbe Financial is proud to be an Equal Opportunity Workplace.
Diversity candidates are encouraged to apply.

Please e-mail resume to careers@soesbefinancial.com
along with a cover letter explaining your interest and highlighting your qualifications