



Contact: Nicole Greer, PPCC

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www.vibrantcoaching.com



Start planning for a brilliant future!

Vibrant Coaching is the recruiting firm for a private wealth advisory practice.

Located in Statesville, NC this is an opportunity for a highly organized, motivated, experienced Paraplanner.

This **full-time** position:

- Provides support for the advisor.
- Requires superior customer service delivering a unique client experience defining and differentiating the practice.
- Offers growth potential to become a financial advisor and equity in the practice.

Key Responsibilities:

- Provide planning and investment support to advisor
- Collect, input, and prepare client data for financial plan
- Review, analyze, and interpret financial statements
- Prepare preliminary proposals, asset allocation reports and hypothetical illustrations
- Client meeting preparation
- Handle financial transactions and trades on behalf of clients
- Assist in preparations for regulatory compliance inquiries and branch audits
- Ability to monitor compliance
- Follow-up on all client meetings
- Answer clients questions as they occur and provide exceptional client service
- Prepare life and disability insurance proposals

Qualifications:

Service Oriented
Professional Appearance
Strong Written and Verbal Communication Skills
Proficient in Microsoft Word, Powerpoint, Excel, Outlook

Requirements:

Bachelor's Degree
2 Years in Financial Services
Current NASD Series 7 and 66
Current Life & Health Insurance Licenses

Send resumes to: recruiter@thevibrantcoach.com