

## Financial Planner/Paraplanner

Great Lakes Wealth – Northville, MI

Job Type: Full- Time

\$40,000 - \$60,000 a year. (Salary + potential bonus)

Come join a boutique environment, but fast-paced wealth advisory firm offering financial planning and asset management services to high net worth clients. We take a goals-based approach to wealth management, incorporating the latest technology mixed with a human touch. While the focus of this position will be on financial planning responsibilities, the right candidate will be involved in all aspects of the business.

### **You will have the opportunity to:**

- Understand a client's unique situation, make planning recommendations, participate in client meetings and build relationships with clients
- Educate on goals-based wealth management
- Assist in making technology decisions for the firm, including our digital & social media presence.

### **Responsibilities will primarily include:**

- Working with new clients to review all their data and obtain any missing information we require to make planning recommendations
- Building a profile using our Riskalyze, Morningstar, and Financial Planning software for each client and making sure it is continuously up-to-date
- Developing an Investment Policy Statement for clients
- On boarding clients: client agreements, transfer of assets, account openings
- Over time, the right candidate may become the primary relationship person on some client accounts

### **Skills critical to success:**

- Strong attention to detail and ability to crunch numbers
- Excellent communication, organizational, and client skills
- Ability to multi-task
- Be an all-around team player
- Flexible and hard working
- Desire to work in a fast-paced environment

### **Candidates should have:**

- 2+ years of experience working as a Paraplanner, Financial Planner, or Financial Advisor in the financial services industry
- Associate's degree or higher required
- Series 65 preferred and/or willing to obtain within 180 days of hire
- CFP or CFA designation now, or wanting to obtain once hired
- Salary: \$40k to \$60k/year with room for growth over time