FINANCIAL PLANNING
FORT COLLINS

Paraplanning Specialist
Financial Planning Fort Collins
375 E. Horsetooth Rd
Bldg. 3. Ste. 203
Fort Collins, CO 80525

About This Position

Our newest role is for an A-player who will focus on both paraplanning and client engagement in a highly collaborative, dynamic environment.

- Do what you enjoy and enjoy what you do in our lifestyle enterprise.
- Our local office is available to you but is not your required workspace.
- Work from anywhere and find work-life balance at our modern financial planning practice.
- Become our internal paraplanning expert.

About Our Firm

At Financial Planning Fort Collins, we are full-time fiduciaries who excel at working with successful singles, couples, or families who want a team of highly-qualified professionals to create and implement strategies for their financial planning, investment management, and income tax preparation. We do not sell investment, insurance, or any other financial products.

Role and Responsibilities

As a small ensemble, we all wear many hats. Each member of the team will contribute to “onstage” client-facing activities as well as “backstage” administrative responsibilities.

- Act as our liaison between operations and advice, communicating with our clients, operations specialist, and financial planners, to best meet our clients’ needs.
- Complete initial and ongoing financial planning data entry.
- Be our go-to digital paperwork pro, organizing and filing documents according to our structured system.

- Prepare financial planning analyses — including cash-flow, equity compensation, estate, investment, insurance, and tax — using our robust library of apps and tools .
- Work with financial planners to prep them for client meetings.
- Engage clients to provide them with implementation support.
- Assist with internal operations process development to enhance the client experience.
- Refer to and update our Reference Guide to implement our established client service process and improve it as our processes evolve.
- Coordinate with professional service providers for the benefit of our clients and our processes.
- Other duties as required.

Qualifications, Education, Skills

The following competencies are not required but will give you a head start in our vetting process.

- 2+ years' experience in a personal finance-related position with paraplanning responsibilities
- Higher-education degree
- Financial Paraplaner Qualified Professional℠ (FPQP®) designation
- Series 65/66 (or a willingness to become licensed within six months)
- Self-driven and self-starting
- Customer service experience
- Strong and adaptive interpersonal communication skills (including chat, email, phone, remote meeting, and text message)
- Highly proficient technology skills
- Ability to remain discreet and maintain confidentiality
- Skilled at adjusting to changing priorities and sticking to deadlines

Our Tech Stack

You will use the following apps and tools, and we will train the right individual as needed. Bonus points if you're already familiar with any of the stuff below!

- Betterment for Advisors, Canopy, Charles Schwab, DocuSign, Estate Guru, Google Workspace, Holisitplan, Intuit ProConnect, Nitrogen (formerly Riskalyze), Orion, QuickBooks Online, RightCapital, RingCentral, Salesforce, Social Security Timing, and Zoom.

Compensation

This is a full-time salaried (W-2) position eligible for our listed benefits.

Annual Salary

- $50,000 - $55,000 *plus* quarterly bonus of up to 20%

Benefits

- 401(k) with 100% match up to 5%
- Health, Dental, and Vision insurance
    - In our small group plan, FPFoCo covers 50% of premiums for employees and 33% for spouse or domestic partner and/or dependant(s)
    - Health savings account (HSA) contributions through payroll deduction also available
- Short- and long-term disability insurance
    - Available through NAPFA as a member employee
- Life insurance
    - Available through NAPFA as a member employee
- Paid holidays
- Unlimited paid time off
- Employee ownership program (you get an ownership grant on day one)
- MacBook Pro + AirPods Pro
- $500 allowance for home office setup
- Professional certification/education reimbursement (up to 100% of costs, with prior approval)
- Annual team retreat: A team building and strategic planning event in a fun location chosen by our team (that means you, too)
- Professional development: Love networking and attending industry events? We'll send you to up to two conferences in the contiguous U.S. each year (all expenses paid, with prior approval)

To apply, send your cover letter/video and resume to us at hello@fpfoco.com. We are currently accepting applications for this position.