

Paraplanner

Briaud Financial Advisors is looking for a paraplanner / client service associate (CSA) who is dedicated to taking care of our clients' needs. The candidate should be highly motivated, thorough and very detail oriented. Any applicant should be able to prioritize multiple projects and enjoy working in a team oriented environment. On the job training will be provided so no specific experience is required.

Any candidate must have the following to be considered:

- A bachelor's degree
- CFP or in the process of earning the Certified Financial Planner designation (not necessary if already a Personal Financial Specialist)
- Demonstrated excellence in an area (i.e. academics, sports, previous job, hobby, etc.)
- Excellent conceptual and problem solving skills
- Good communication skills
- An ability to navigate Microsoft Office, including Excel, Word, Powerpoint, etc.
- Prior financial planning experience is desirable, but not required

Paraplanner (CSA) responsibilities include:

- Establishment or execution of new accounts, transfers, deposits/withdrawals, trades and other admin items when needed
- Contribution to the development and implementation of financial plans for new clients in support of financial advisors
- Client interaction through answering inbound questions via phone, email, mail or meeting
- Support our financial advisors as needed

Salary is commensurate with experience and qualifications. Benefits provided include health insurance and 401(k) plan among others.

To apply, send resume and cover letter to jobs@briaud.com

BRIAUD Financial Advisors

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