



BE A PART OF OUR TEAM!



We are hiring Database and CRM Specialist

Do you enjoy working with spreadsheets, organizing information, and solving problems?

Are you detail-oriented, tech-savvy, and comfortable working independently?

This could be the job for you!

- Part-time, approximately 20 hours per week to start
- Potential for additional hours as the position grows
- Comprehensive training and ongoing support
- Fully remote opportunity
- Starting pay of \$20-\$23 per hour

Put your organizational skills to work with a team that values what you do!



The Job

You'll play an important role behind the scenes, helping keep our databases, spreadsheets, and CRM information accurate, organized, and up to date.

Working closely with our Database & IT Director, you'll assist with organizing data, preparing CRM uploads, reviewing territory information, and supporting reporting and analysis.

If you enjoy working with information, solving problems, and learning new technology, this could be a great fit! We'll provide training on our systems and processes, along with ongoing support as you grow into the role.

Who We Are

Paragon Planners is a driven, enthusiastic team providing administrative and operational support to professionals in the financial services industry.

We believe in teamwork, clear communication, and taking pride in the details that help our clients succeed.

Every member of our team plays an important part in keeping our operations running smoothly, and we value the contributions each person brings.

Responsibilities

- Organize, clean, and maintain Excel spreadsheets and database records
- Identify and correct duplicate records, formatting issues, and data inconsistencies
- Prepare, review, and validate information for CRM uploads
- Assist with territory zones, mapping information, and advisor rankings
- Support data analysis, reporting, and operational projects
- Maintain accurate records and billing-related documentation
- Track assignments, deadlines, and project progress
- Handle confidential information with care and professionalism
- Learn new systems and assist with additional database projects as needed



Preferred Qualifications

Education: High school diploma or equivalent

Experience: At least one year of related experience or training; two or more years preferred.

Experience with Microsoft Excel, spreadsheets, data management, CRM systems, or administrative operations is preferred.

Training will be provided on Paragon's systems and processes.

Skills, Abilities and Equipment

- Strong Microsoft Excel and general computer skills
- Exceptional attention to detail and accuracy
- Excellent organizational and time-management skills
- Ability to identify errors, solve problems, and follow through on assignments
- Comfortable learning new software and working across multiple systems
- Ability to work independently while communicating effectively with team members
- Strong written communication skills
- Dependable, self-motivated, and willing to ask questions when clarification is needed
- Ability to handle confidential business information responsibly
- Quiet, dedicated home workspace
- Reliable high-speed internet connection
- Personal Windows-based computer meeting the requirements listed below



Other Requirements

- Personal Windows-based desktop or laptop running Windows 11
- Macs, Chromebooks, tablets, and iPads are not compatible with our systems
- Minimum 4 GB RAM
- Minimum 500 GB hard drive, with at least 50 GB available
- Minimum 2.0 GHz processor (2.60 GHz preferred)
- Current antivirus and anti-spam protection compatible with company software
- Reliable high-speed internet connection
- Quiet, dedicated home office suitable for handling confidential information

Employment

Employees are covered under Workman's Compensation, Unemployment Insurance, and earn paid sick leave. Based on hours, employees may be eligible for a monthly expense reimbursement, health, dental, and vision insurance benefits and 401k matching (US residents only, please).

We do not discriminate on the basis of race, color, religion, national origin, sex, age, disability, or any other status protected by law or regulation. It is our intention that all qualified applicants are given equal opportunity and that selection decisions be based on job-related factors.



The Details

The Financial Industry mandates extensive background checks are completed before beginning training. (Can take 1-3 weeks)

This is a fully remote, part-time position beginning at approximately 20 hours per week, with the potential for additional hours as the role grows. Starting pay is \$20-\$23 per hour, depending on experience and location.

Training will be provided. You'll work closely with our Database & IT Director while developing your skills and learning our systems.

We are currently hiring in:
AL, AZ, FL, GA, ID, KY, LA, MI, MO, NC,
OH, OR, SC, TN, TX, UT, and WY.