Paragon Planners

BE A PART OF OUR TEAM!

We are Hiring Virtual Assistants for Financial Planners

Do you thrive working independently, being organized, getting things done, and being responsible for your performance?

Would you enjoy working in the professional world from the convenience of your home office?

This could be the job for you:

- must have a minimum of 20 hours M-F during business hours available, hours will build based on client assignment
- comprehensive training
- ongoing support
- opportunities for growth and development

Help others succeed with your success.

The Job

You will be in the driver's seat and responsible for building strong relationships through assisting Financial Advisors.

You will support the client by handling multiple tasks and deadlines in an organized fashion with a "can-do attitude".

Building and maintaining relationships is a key aspect of this position. Other responsibilities can include:

- prepare and process paperwork with accuracy
- maintain high attention to detail with view of overall process
- schedule appointments
- communicate with clients and financial companies
- drive marketing activities such as events, social media, life event programs etc.
- database maintenance

Who We Are

We are a driven, energized, enthusiastic team of planners and makers, providing premier services and elevating success. Week after week, we increase connectivity with clients, expanding and deepening client bases, propelling success. And we bring heart to that hustle, because understanding and positive relationships are our number one priority.

Every goal we set, team we support, marketing service we create, expense report we process, or call we place on behalf of our clients is the result of our team working together to make each other's ideas stronger. That happens here because every one of us strives toward a common goal — creating the best customer experiences.

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Responsibilities

- Provide the highest level of customer service
- Develop, manage and retain strong client relationships
- Prepare and process new client accounts using various internal and external systems
- Prepare and process paperwork with accuracy and efficiency
- Create client touchpoints throughout the year
- Client meeting preparation and follow up
- Respond to client requests
- Arrange and coordinate virtual and in-person client events
- Execute projects from start to finish, with consistent communication
- Manage calendar and schedule appointments (potential extensive phone work)
- Database maintenance
- Possibly manage social media and website updates
- Multi-task at a high-level managing:
    - Project implementation and timelines
    - Manage multiple priorities in a deadline-driven environment
    - Create and manage tracking systems for projects
    - Speed and accuracy in data entry and written communications

Preferred Qualifications

High School Diploma or equivalent

Experience: Two years experience in the financial service field, customer service relations, client services or equivalent

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Skills, Abilities and Equipment

- Strong written, verbal and interpersonal communication skills
- Proficient computer skills. Must be able to move quickly and fluidly through multiple programs and internet browser tabs at once
- Excellent organizational skills, ability to problem solve and create efficiencies, ensuring nothing falls through the cracks
- Ability to prioritize work and multi-task effectively and efficiently while maintaining accuracy
- Sufficient patience to do repetitive work correctly and follow directions exactly
- Experience in word press, media design platforms and social media platforms is a plus
- Ability to respond to email and voicemails Monday-Friday
- A home office which allows for a quiet and uninterrupted work environment and a protected, clean space to store materials and supplies
- A dedicated phone line with a customized professional greeting
- A personal computer (see requirements below)

Other Requirements

- A working (PC) computer with an operating system of Windows 10 or later (MACS and TABLETS are not permitted - no iPads/Chromebooks)
- 4 GB memory RAM
- 500 GB hard drive (at least 50 GB free hard drive disk space)
- 2.0 GHz processor (2.60 GHz preferred)
- Current anti-virus and anti-spam software. McAfee and Norton Antivirus are not compatible with our software. Recommended antivirus (premium subscriptions): Kaspersky, Bitdefender, F-Secure, Sophos, Malwarebytes.
- A high-speed internet connection with a minimum 25 Mbps down and 5 Mbsp up-speed
- A router, Speakers/Headset, Microphone, webcam
- A noise free and ergonomically compliant home office environment

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)

Training period depends upon your learning curve. You will need to demonstrate flexibility, great organization, and a knack for multi-tasking to increase work hours.

Work hours typically between 8:30am-4:30pm Monday-Friday. Clients available in all time zones. This is an hourly position. Starting pay: $15.00-$17.00, depending on experience.

We are currently accepting resumes from the states listed on our website: https://paragonplanners.com/employment

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