VAHANIAN & ASSOCIATES
FINANCIAL PLANNING INC.

60 Railroad Place, Suite 104, Saratoga Springs, NY 12866

Client Services & Financial Paraplanning Associate

We are looking for a professional with strong interpersonal and collaboration skills who has the ability to thrive in an environment where quick-thinking, proactive initiative, determination and team-player mentality are fundamental to supporting our clients and firm.

This role will initially support our clients in an operational client service capacity with the opportunity to play more of an advisory role down the road. There will be a great deal of financial planning and client interaction with the ability to participate in meetings as needed.

Responsibilities (Included but not limited to):

- **Financial Planning**: (Running eMoney reports, gathering client income and asset information, collaborating with client estate planning attorneys and accountants, asset divisions and beneficiary dispersions, updating cost basis, gifting, RMD planning and processing, and insurance and LTC quotes, with the ability to participate in client meetings as the role progresses.)
- **Client Service**: (Direct client interaction and support with asset movement, trading, meeting preparation, including use of portfolio management software and reporting, creating meeting agendas, aggregating necessary supportive documents, account paperwork, updating client records, trade notes and trade checking, and indexing client documents and information into CRM.)
- **Ongoing Team Support**: (As a small office, everyone is required to wear many hats and be cross-trained in various functions. There may be times when this role is needed to support and work with other team members in other capacities. Collaboration with team members is crucial.)

Qualifications:

- Prior financial services or banking experience required
- SIE, Series 7 and 63 required
- Goal of working towards Series 65 during employment
- CFP® or Series 24 a plus
- Strong background in Microsoft Office suite (Outlook, Word, Excel, Nuance, etc.)
- Experience using CRM and client record-keeping software
- Experience with e-signature a plus

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- Strong client focus and relationship management skills
- Strong communication skills
- Commitment to integrity and a high level of excellence
- Self-motivation
- Ability to work autonomously and collaborate with team members
- Ability to problem solve and develop solutions for clients and office
- Strong multitasking skills
- Thoughtful attention to detail
- Strong background in technology
- A bachelor's degree is required

What you will receive:

- Competitive compensation commensurate with experience and bonus potential.
- Annual wellness program after six-months of employment.
- 401(k) participation and employer match after one-year of service.
- Employee health insurance benefits paid in full (medical, vision and dental).

How you will fulfill your potential:

We hire based on character and integrity first. However, certain skills, abilities and experience are still required as indicated. At Vahanian & Associates, we believe success and an ability to fulfill your potential is based on a balance of hard work, commitment to excellence, leveraging your unique skillset, and collaborating with team members. Above all, we want you to exceed your own expectations. We believe that a career with our team has the potential to enhance your life, expand your skills and abilities while also supporting our clients.

V&A

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