



WE LIVE TO PLAN. YOU PLAN TO LIVE.

## **Paraplanner**

**Fee-Only RIA Firm Southern NH, Northern MA**

If you despise the Wall Street “book of business” mentality and you are passionate about helping **people** achieve their personal and financial goals this is where you start!

Bartley Financial is an established and growing, fee-only firm looking for an A-team financial professional to serve our clients as we help them get clarity on what is most important/their life goals and relieve the stress of managing their finances.

The culture at Bartley Financial is fast-paced and collaborative. We are just as passionate about improving our employees’ lives as we are our client’s lives. Quality of life is our primary focus; we offer a flexible working environment, external and internal coaching and mentoring to grow your career and personal life.

### **Responsibilities:**

- Actively participate in all levels of planning: Retirement, Estate, Tax, Insurance/Risk Management, Cash Flow, Investments and Education/other Goal Planning.
- Assess client’s financial situation, analyze results, and assist with developing recommendations in conjunction with the lead advisor
- Prepare for meetings, attend meetings with lead advisor, and complete post meeting or delegate post meeting tasks
- Take part in securities trading and work with our portfolio management software
- Maintain client relationships: interact via email, phone, Zoom and in person
- Be involved in your local community, volunteer/give back

### **Job Type:**

- Full Time

[www.BARTLEYFINANCIAL.com](http://www.BARTLEYFINANCIAL.com)

169 SO. RIVER ROAD, SUITE. 17 – BEDFORD, NH 03110 – Tel (603) 625-9900  
300 BRICKSTONE SQUARE, SUITE 201 - ANDOVER, MA 01810 - Tel (978) 806-2228



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**Pay:**

- Salary commensurate with experience and credentials
- Bonus pay with profit sharing

**Benefits:**

- 401k with employer contribution
- Profit Sharing
- Coaching/Mentorship
- Competitive holiday/time off
- Tuition, CPE, and licensing renewal reimbursement
- Health Insurance
- Disability Insurance
- Life Insurance

**Education/Professional Designation:**

- Have obtained, working toward, or interested in working toward a Certified Financial Planner (CFP) designation
- Bachelor's degree or higher

**Ideal Candidate:**

- Must be competent with technology
- Passion to help others to make a difference in their lives
- Self-starter and gravitates towards continuous learning
- Client service approach
- Exceptional time management and organizational skills (we have the tools and can train)
- Detail oriented with strong analytical and problem-solving skills
- Personal integrity and commitment to excellence – we in-turn are committed to you!
- Strong verbal, written and listening skills
- Thrives in a team environment
- Adaptable/Flexible
- Positive attitude

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