

Financial Planning Paraplanner:

Firm Name: Baystate Financial

Office Location: Wellesley, MA

Position: Entry-Level

Summary of Responsibilities: Responsible for helping to construct and manage financial plans through data collection and input, making updates to plans, and building planning scenarios.

Major Job Responsibilities:

- Organize and input client data into financial planning software
- Effectively communicate with both clients and the team regarding the planning process
- Schedule and host live online meetings with clients to establish their individual websites
- Provide ongoing support to clients to maintain and update financial plans
- Manage work flow to ensure timely delivery of plans

Knowledge/Skills Required:

- Excellent interpersonal communication skills
- Strong problem-solving abilities
- Ability to work effectively as a member of a team
- Willingness to be flexible and work in a fast-paced environment
- Highly organized with strong attention to detail
- Bachelor's degree (potential to start as intern)
- Past financial services industry experience a plus

** To be considered for this position, please submit your resume and cover letter by email to Azadeh Ward at award@baystatefinancial.com