Paraplanner - Advisor Track

June 9, 2025

As a Paraplanner at ProsperiTea Planning, you will be responsible for assisting in every aspect of the financial planning process. The ideal candidate will have already obtained their CFP designation and have 2 years of RIA industry experience. This will ideally be a three-year position, at which point, the Paraplanner will begin to step into a Financial Planning role and become the primary on client relationships. We are open to this position being remote as long as we can see each other once per quarter.

About ProsperiTea Planning

ProsperiTea Planning is a fee-only fiduciary Registered Investment Advisor located in Greenfield, Massachusetts. We serve 100 client families and manage $127 million in assets on their behalf. We currently have a four-person team that consists of two Financial Planner / Principals, one Paraplanner, and one Office Manager. The addition of another Paraplanner will help us meet both our near-term and long-term growth goals.

Paraplanner Duties:

Meeting Prep:

- Be forward-thinking with regard to getting meeting materials prepped.
- Maintain accurate Client net worth statements in Excel and keep portfolio holdings up to date in Advyzon.
- Create financial plans in RightCapital.
- Update "Stocks to Monitor" list, watching for things that need to be sold in the single-stock positions people brought with them into the practice.

Client Service:

- Serve as second chair in client meetings to assist with CRM project creation in real time, as well as running with and completing projects after the meeting.
- Execute client projects and deliverables from start to finish using our CRM to track and monitor. Examples include, retitling accounts, ERISA rollovers, assisting with insurance or mortgage projects, move money requests, etc.
- Create rebalance proposals utilizing tax-efficient strategies, such as Asset Location, using our Excel trade worksheet and Advyzon data.

- Custodial papering: creating new accounts, transferring assets, updating beneficiaries, setting up SLOAs, etc. (We also have a CSR doing these.).
- Create renewal quotes and quotes for new clients, which include calculating the fee, creating the contract, and updating our billing/invoicing system.
- Answer client questions in emails when possible.

Additional Duties:

- Reconcile trades to confirm they were executed correctly.
- Prepare statements for clients upon request.
- Prepare performance reports in Advyzon annually and upon request.
- Update and maintain company manuals and SOP's.
- Lead and/or participate in firm-wide projects, such as software implementation.

Ideal Personal Attributes:

- Personable
- Service mentality
- Intelligent
- Hard working and talented
- Desire to learn and become an exceptional advisor
- Kind

Preferred Qualifications:

- At least two years of RIA industry experience
- CFP designation
- Bachelors degree with a high undergraduate GPA
- Demonstrated interest in a Financial Planning career
- *Note: we would also consider a CPA instead of a CFP®. We would tweak the job duties so that it would be more tax-focused.*

TO APPLY, CANDIDATES MUST UPLOAD THEIR RESUME AND COVER LETTER TO SHAREFILE USING THE FOLLOWING LINK:

https://teaandtaxes.sharefile.com/r-r15ee95663df64ffba7bbed2a4e69393b

Please name the files as follows:

- Candidate Name_Date_Resume
- Candidate Name_Date_Cover Letter

For example: John Smith_6.18.2025_Resume