www.omegafinancialplan.com

Position Title: Paraplanner (Financial Planning Associate)
Position: In Person, Peachtree City Office
Employment Type: Full Time

Are you ready to make a meaningful impact in people's lives, one financial plan at a time? Our firm is seeking a Licensed Paraplanner who brings precision, initiative, and a client-first mindset to a vibrant, full-service advisory team. You will collaborate directly with financial advisors, prepare comprehensive plans, conduct research, and ensure every client's data and strategy are in perfect shape, starting with a 6-month probationary period. This opportunity is ideal for someone who thrives in a fast-paced, high-expectation environment and is committed to going the extra mile.

Best-in-Class Benefits and Culture:

Our client values the time and efforts of their employees. Their commitment to employee success is reflected in competitive compensation of $75,000-$100,00 annually, based on experience, bonus potential after 12 months of employment, and a comprehensive benefits package that includes:

- Comprehensive health coverage: Medical, dental, and vision insurance provided
- Robust retirement planning: 401(k) plan available with employer matching
- Financial security: Life and disability insurance for added protection
- Flexible financial options: Health savings and flexible spending accounts offered
- Well-being and work-life balance: Paid time off and flexible schedule

Additionally, our client fosters an environment that enables employees to learn, grow, and thrive. They promote a collaborative and creative workplace culture where every team member is encouraged to contribute to ongoing processes, decisions, planning, and the company's growth.

To succeed as a Licensed Paraplanner, you should have:

- Bachelor's degree in Business, Finance, Accounting, Economics, or a related field, with at least 5 years of experience in financial planning, wealth management, or a client service advisory environment.
- FINRA Series 7 and 66 (or 65 & 63) licenses required; Life, Health, and Variable Insurance licenses preferred or in progress.
- Solid proficiency in eMoney, Microsoft Office Suite, CRM platforms, and financial planning or FinTech tools; ability to quickly adapt to emerging technologies and AI efficiency applications.
- Solid analytical, organizational, and communication skills with strong attention to detail, initiative, and the ability to work independently or collaboratively in a fast-paced environment.
- Solid English language skills; able to read, write, and communicate professionally with clients and colleagues. Occasional travel may be required for client meetings, conferences, training sessions, or firm events, both within the local area and outside the state.
- Registered Paraplanner (RP®) designation preferred

- CFP® coursework completed or in progress preferred

Your responsibilities as the Licensed Paraplanner will include:

- Develop and maintain financial plans: Prepare and update comprehensive financial plans, investment proposals, and retirement projections using tools like eMoney under the direction of the financial professional.
- Analyze and organize client data: Gather, verify, and interpret client financial information, including assets, liabilities, income, expenses, and risk tolerance, to support plan accuracy.
- Execute trades and transactions: Process trades and model rebalancing for investment accounts in accordance with the advisor's documented instructions.
- Support client meetings and onboarding: Prepare meeting materials, assist in onboarding new clients, take detailed meeting notes, and manage post-meeting follow-ups.
- Ensure compliance and service excellence: Maintain adherence to regulatory and firm policies while coordinating client service requests and helping resolve issues efficiently.

About The Firm

The firm's primary purpose is simple yet profound: to deliver tailored, high-impact financial solutions that help individuals envision and achieve a meaningful, purpose-driven future. We believe in a team-based approach that brings together diverse backgrounds, education, and experience to ensure each client receives a strategy designed specifically for their goals. Our team provides undivided attention from planning through execution and ongoing follow-up, anticipating challenges, identifying opportunities, and maintaining a firm focus on client success. Serving primarily pre-retirees and retirees, we understand that sound decisions today shape a secure tomorrow, which is why we are dedicated to helping clients make informed choices with confidence.

We are energetic, collaborative, and client-service focused. Our client-first culture demands top performance and a can-do attitude while fostering a supportive workplace built on teamwork, integrity, and excellence.

This firm is an equal opportunity employer that welcomes and encourages diversity in the workplace. They do not discriminate based on race, color, religion, marital status, age, national origin, ancestry, physical or mental disability, medical condition, pregnancy, genetic information, gender, sexual orientation, gender identity or expression, veteran status, or any other status protected under federal, state, or local law.