Financial Industry Operations Specialist & Paraplanner

Make a difference in the lives and financial wellness of others as a valued member of a caring and service-driven team that provides client-centric financial planning and wealth management. (Note: while financial industry experience is helpful, it may not be required if you have other relevant experience and/or training.)

Join us and become part of a team that will quickly feel like a supportive family and the best career move you've ever made. As an Operations Specialist & Paraplanner, you'll help develop and implement information systems, back-office infrastructure and investment portfolios in an environment where workflow to serve our clients is energized, nimble, and responsive. You'll gain new skills, have advancement opportunities, and know that daily your contributions are valuable to the team and meaningful to the lives of our clients. At Financial Harvest Wealth Advisors, we encourage and support both career development and work-life balance.

Work Environment and Role

Financial Harvest values both clients and team members. We strive to help others achieve goals and live fulfilling and impactful lives. Where other firms only see account numbers and balance sheets, we see relationships, opportunities for leadership and service, and the privilege in helping others live their best life.

Now is a great time for you to join us. Our firm is growing quickly, increasing both in the number of clients serve and the assets under management (AUM) entrusted to our care. We need you to help with both our internal commitment tracking and fulfillment, as well as our client-facing communications and service delivery.

You'll be harnessing best-of-breed information systems (including Black Diamond, eMoney Advisor, RedTail, and Schwab Advisor Center) to enable effective client service and the delivery of essential commitments in a timely and accurate fashion. In addition, you'll lead communication and coordination with our strategic account custodian relationships including Schwab Institutional and TD.

This role is ideal for you if you are interested in:

- A career with learning and advancement opportunities
- Developing creative improvements to operational processes
- Rewarding firsthand relationships with clients and the chance to see how your efforts change lives in significant ways
- Being part of a team that always has each other's back and is wired for collective and individual success
- Redefining an industry that has been stuck in outdated routines and hands-off practices

Our Winter Park, Florida offices provide an appealing, upscale workspace with front entrance security and convenient parking. In 2020, we installed UV lights in our A/C system to better support the health, wellbeing and peace-of-mind of our employees and our clients. (Learn more about Financial Harvest Wealth Advisors in the "About Our Company" section below)

Responsibilities

During your first year, you'll focus on implementing and improving select mission-critical practices and procedures. Working closely with our CEO and associate advisors, you will participate and, at times, solely be responsible for the following initiatives:

- Daily coordination with account custodians to ensure requests and needs for servicing of client accounts is completed accurately and on time.
- Development, implementation, and documentation of all workflow processes within CRM system to track and fulfill commitments and avoid breakdowns so we continually shine for our clients.
- Precise and accurate preparation of documents for meetings to keep client confidence high.
- Integration of our CRM, reporting and custodial technology platforms to make it easy for our expanding team to take care of our increasing client base and create the foundation for future acquisitions to scale 10X.
- Daily implementation of our investment models, rebalancing strategies, trading processes, and money movement on custodial platforms while making sure our internal controls are tight as a drum.
- Thorough written communication with clients updating them on the progress of "on-boarding" during which we establish new accounts and execute transitioning to our firm.
- Improve and maintain excellence in our daily coordination and service functions with clients, custodians, other client professionals and vendors.

Career Opportunities

Beyond your first year, you will have the opportunity to grow personally and professionally with our firm. Future plans call for adding capabilities in acquisitions to our proven ability to grow organically. We also plan to further invest in our ability to acquire and service clients throughout the US using state-of-the-art internet marketing, podcasting, livestreaming and blogging. We expect the new team member to assist our efforts to install the technology infrastructure and internal processes to support these and other future marketing initiatives.

In addition, new opportunities will open in a broad range of functional areas (e.g., associate adviser, financial planning specialist, client service, teaching retirement courses). Should your curiosity, continual learning, and desire to contribute lead you to a broader role in the firm, we are eager to partner and sponsor your development with licensing (IAR) and certification (CFP) processes.

Ready to Apply?

Do you consider yourself to be: Highly attentive to detail? Conscientious and precise? Accurate? A systematic and structured thinker with strong follow-through?

Answer “yes” to these questions and you’ll know that this opportunity should position you well for success and fulfillment in this role. Your next steps are:

- Email a cover letter with your indication of interest along with your resume to info@financialharvest.com. Please include at least one accomplishment in your past role that supports your ability to be successful in the projects listed here.
- Please complete your personal DISC behavioral assessment. As a gift, you will be emailed your results report to help you in further developing your career.

We’re looking forward to hearing from you!

More Insights About Our Company

With over $270 million in assets under management, and 20+% compounded annual growth rate, Financial Harvest delivers family office type personalized services to wealthy clients. These family office type services typically are only accessible to the ultra-affluent. Be bring this level of service to the “little guy.”

We use Dimensional Fund Advisors as our core fund provider. DFA’s investment approach is grounded in economic theory and backed by decades of empirical research. Much of the original work was done by cofounder and Nobel laureate Eugene Fama at the University of Chicago.

We also utilize a comprehensive wealth management approach that less than 6% of advisors embrace in which we actively collaborate with other professional experts to help clients mitigate taxes, transfer wealth to loved ones, protect assets from being unjustly taken and maximize charitable impact. Learn more about how we do this by watching our three-minute video on What We Do. The firm has deep roots in the Winter Park community and a client retention rate of 97%, far in excess of the industry standard. Assets under management more than quadrupled in the last 8 years and our continued growth in 2021 opens many opportunities for you to contribute in serving our clients!