SALTBOX
FINANCIAL

Paraplanner Associate

Saltbox Financial is a boutique, women-owned, fee-only financial planning firm based in Amesbury, Massachusetts. We provide fiduciary financial planning services by the hour and an AUM fee-only basis. We pride ourselves on providing creative, values-based financial planning services with a personalized touch to clients of all backgrounds and income levels. We operate under the principles of cooperative work - everybody has input and we value the collective mind.

Saltbox is on the forefront of impact investing and we advise our clients on investing all along the social impact spectrum, from basic ESG funds to out-of-market investments in community development funds.

This is a LGBTQ+ friendly firm with a large contingent of non-traditional families as clients. We consider ourselves a safe haven for those who are historically underrepresented in the financial industry, both as clients and as employees.

At Saltbox Financial, we are guided by the 7 cooperative principles, which include an emphasis on fairness, transparency, and collaboration. These values are the foundation of our approach, ensuring that all team members have a voice in decision-making, equitable treatment, and a shared commitment to mutual success. We believe in fostering a democratic, inclusive environment where autonomy is respected, and collective growth is prioritized.

We embrace the Kaizen approach, focusing on continuous improvement in our processes, workflows, and teamwork. We seek team members who are proactive, adaptable, and committed to making ongoing changes that drive success, for our clients and the firm.

The ideal candidate is one who is able to work independently and efficiently, while enjoying being part of a small team of seven, and knowing when to ask questions and seek advice. Candidates that fit into our firm and culture will embrace technology, have a good sense of humor, and hold a high regard for being an integral part of delivering our services to our vibrant and diverse clients

The Paraplanner Associate position is a half-time, exempt, salaried position, at 18 hours per week (full-time is 36 hours per week). You'll be working closely with the firm's two lead Financial Planners, and at times, the firm's Principal. We are seeking someone interested in a long-term commitment for this current half-time role, as we hope to build a lasting and collaborative relationship.

Responsibilities

- Pre-Meeting:
  - Gather, assess, organize clients financial data
    - Retrieve client documents via ShareFile and save in Dropbox following the firm's filing structure and naming conventions
    - Review client documents for completeness and make requests for additional materials
    - Update Wealthbox CRM with client context and contact information
  - Input client information and update financial plan
    - Update clients' information and holdings in Right Capital and/or Morningstar
    - Prepare comments for advisor as necessary
- Post-Meeting Financial Plan preparation:
  - Review meeting recordings from AI Assistant software, download transcripts, and record summaries to CRM
  - Create thorough, concise, and understandable written follow up materials in Word, using TextExpander and AI tools
  - Make changes to financial plans in Right Capital as per advisor meeting recommendations and run relevant reports
  - Prepare investment account rebalance instructions using Morningstar Office and Excel.
- Ongoing Administrative
  - Track and record billable time related to client work
  - Follow workflow systems and task management in Wealthbox CRM and Airtable
- Client Communication
  - Reply to email queries (direct or triaged to you) from clients regarding their follow up materials

Required Qualifications:

- Bachelor's degree
- Availability during Eastern Time business hours
- 1 year experience at a financial planning firm creating and delivering financial plans OR 2 years general financial planning experience

Necessary Skills:

- Fully fluent in using Dropbox, Zoom, Slack, Adobe Acrobat Pro, Google Workspace (Gmail, Calendar, Sheets, Docs) and Microsoft Office products (Word and Excel)
- Familiarity with RightCapital or similar financial planning software.
- Familiarity with Wealthbox CRM or similar client relationship management software
- Desire to work at a firm that centers on excellent client care and commitment to continuous improvement of systems and services
- Passionate for open, collaborative, and transparent communication and who enjoys building productive working relationships on a small team.
- Excellent organizational skills, ability to multitask, and prioritize competing deadlines
- A deep sense of personal accountability and responsibility

Desired Skills:

- Experience working at a fee-only financial planning firm
- Experience with financial coaching

Bonus Skills:

- Series 65
- Experience with Airtable, TextExpander, Citrix ShareFile, Quickbooks Online, Morningstar Office
- *CFP certification, or work toward it, is a bonus, but not required*
- *Strong, private home internet connection*
- *This role is mostly back office, but we still value strong communication skills and a warm approach with clients*

About this role:

- This is a part-time position, 15-20 hours per week. More hours may be available during tax season for a candidate that is interested in doing tax preparation.
- The salary for this position is $29,100. This is a W2 position.
- Hours are somewhat flexible, but we require availability during EST business hours. Project-based work and some items can be completed outside EST business hours.
- We are seeking somebody who is available 3-4 days per week, working shortened hours

How To Apply

- **Send a brief cover letter and resume to hiring@saltboxfinancial.co**
- **Saltbox Financial is an equal opportunity, welcoming employer. We especially encourage applicants who are not well represented in the financial services industry to apply - people of color, LGBTQ and queer people, women, trans and non-binary people, people with disabilities.**

We are committed to offering fair employment opportunities to all team members and prospective employees, regardless of their race, ethnicity, religion, gender, sexual orientation, gender presentation, country of origin, age, genetic background, disability, or military service history.

Furthermore, we firmly believe that a diverse range of viewpoints, life experiences, and skills enriches our organization and fosters a dynamic and inventive workplace. We actively encourage individuals from various backgrounds and identities to apply, and we extend a warm welcome to applications from women, individuals with diverse racial and ethnic backgrounds, and other communities traditionally underrepresented in the financial sector.