PREPARED RETIREMENT INSTITUTE
EDUCATE.PREPARE.MANAGE.

215-997-5700
105 Montgomery Ave., Suite 1053
Lansdale, PA 19446

Firm Description: Based in the Philadelphia-metro area, Prepared Retirement Institute is a fee-only financial planning and portfolio management firm comprised of advisors who serve as 'chief financial officer' for high-net-worth members of the widowed community, business owners, individuals & families across the country.

We know that every investor's journey is deeply unique. Prepared Retirement Institute utilizes a collaborative investment philosophy that emphasizes a team approach to decision-making, empowering members to confidently navigate the complexities of retirement planning and financial security. Advisor-Client partnerships also include a dedicated Relationship Manager who provides white glove concierge-level service, ensuring any ask of our members is minimal (including paperwork).

Please visit our website at www.preparedretirementinstitute.com to learn more.

Title: Paraplanner

Qualifications

- Candidates must have Bachelor's degree.
- 3+ years of relevant work experience - financial planning, accounting, or other equivalent
- Licensed to trade - Series 65 or CFP, preferred

Role Requirements

- Ambition – Candidates should posses a constant desire to learn and passion for financial planning.
- Organization – Capable of multi-tasking and completing tasks in the assigned time frame.
- Attention to detail – The ability to complete forms accurately and communicate clearly, particularly in writing.
- Compliance – A willingness to document client correspondence manually when necessary, and conform to all other SEC regulations.
- Consideration – Be committed to checking our systems for information before interrupting a team member's work day. Time is our most valuable asset and we make every effort to communicate asynchronously when possible.
- Reliability – When given ownership of a task/project, the team should feel confident knowing it will be completed on time.
- Aptitude for technology – An ability to effectively use our technology stack and the capacity to think strategically about ways we could use our existing software to better serve our clients.
    - Knowledge of financial software programs such as eMoney, Advyzon, Holistiplan, and custodial interfaces preferred.

Role Responsibilities

- Collects, reviews, and analyzes Client financial and lifestyle data to develop a financial plan best suited to individual clients' needs while in accordance with fiduciary guidelines set by regulatory agencies (SEC, FINRA, etc.).
- Utilizes eMoney and Monte Carlo analysis to design cash-flow, tax and estate planning strategies advisors may use with clients to achieve their financial goals and objectives.
- Identifies and keeps abreast of new market trends, financial products, and legislation.

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- Maintains detailed client records in PRI databases (eMoney, Advyzon, Holistiplan, etc.) in order to comply with Federal, State, and local regulations.
- Produces PRI-branded financial report deliverables with a high degree of accuracy and attention to detail.
- Works with advisors and support staff to implement the financial plan selected by client.
- Adheres to the PRI Client Segmentation guidelines, Client Lifecycle processes and follows the PRI Ongoing Service Calendar.
- Utilize workflows and activity templates in the CRM and constantly be on the lookout for ways to improve our current processes.
- Manage all client forms digitally, scanning files when necessary and ensuring forms are saved in accordance with firm guidelines in the company's shared drive (SharePoint).
- Help to manage our firm's portfolio management software (Advyzon) to ensure that household portfolios are accurately tracked and reported, maintaining consistency across systems.
- Be willing to accept any administrative tasks that allow our Advisors to focus on their clients.
- Help recruit, hire, train, and manage others on the Client Service team as the firm continues to grow.

Career Path
For those who wish to pursue rigorous licensing exams, a successful Paraplanner will have the opportunity to grow into a Financial Planner role, followed by Associate Financial Advisor, before potentially graduating to a lead Financial Advisor role. Path to partnership is available to interested candidates who qualify.

Additional career paths may become available as the firm grows.

Schedule and Location
Full-time, 40 hours per week, Monday to Friday, typically spanning a portion of the hours of 8:00am ET and 5:00pm ET. Primarily on site in Montgomeryville, PA (105 Montgomery Ave., Suite 1053). Hybrid and remote work opportunities may be available.

Professional Compensation

- Base salary - $60,000-$80,000+ per year, placement within this range is dependent on education and experience
- Bonus compensation. Potential for bonus pay available (based on a non-exclusive variety of factors including $ revenue served, number of clients served, performance evaluation, and time in service).
- 401(k) - Company contribution of up to 4% annually; contributions are fully vested immediately
- Federal holiday pay - Observed in accordance with the NYSE holiday schedule
- Personal time off (PTO) - Generous PTO policy based on role and time in service
- Medical, dental, and vision insurance available with an employer subsidy
- Professional Development & Training - Robust onboarding, ongoing training, and access to firm leadership; opportunities to participate in the Investment Committee, Business Development Committee, and cross-functional initiatives
- Additional Perks - Collaborative culture, career-path support, Summer Fridays (early office close), and the opportunity to grow within a fast-scaling, client-centric RIA

Interested candidates may submit their resume and a cover letter to hello@pri-llc.com.