Description:

**Para Planner/Jr. Adviser**

**Overview**

Assist senior advisers with daily client tasks and projects while learning about our business and industry.

**Duties and Responsibilities**

Advance Capital is one of the largest Financial Planning and Investment Management Companies in the State and provides service and guidance to thousands of individuals and families. We are seeking someone in our Southfield headquarters office who wants to begin their career working directly with senior advisers on staff with their day to day interactions with clients while receiving direct on the job experience without high pressure sales goals or probation periods. A brief list of daily activities includes:

- Discussing individual client goals and objectives and developing solutions
- Analysis and Preparation of client Portfolio Reviews
- Retirement Plan Preparation
- Savings Plan Analysis and Recommendation Preparation
- Client outreach events
- Special Projects
- Investment/Tax research

**Qualifications**

**Education:**

Bachelor’s degree in finance, accounting or a related field. The ideal candidate is enrolled or has completed the CFP® certification educational requirements.

**Experience:**

Knowledge of investments and financial planning through work experience or classroom instruction.

**Compensation & Benefits**

This is a full-time, salary position. Salary and bonus are commensurate with experience and qualification. Health Insurance, 401(k), ESOP, Vacation/Personal time.

Contact:
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