

Paraplanner / Client Service Manager – Buffalo Grove, IL

Your Future Team

Fairport Wealth is a values-based, purpose-driven organization that inspires over 2000 families with comprehensive wealth management solutions. Headquartered in Cleveland, Ohio, we serve clients in six regional offices and are strengthened by the resources of Hightower Advisors. Our roots date back to a multi-generational business, and we continue to excel as a supportive, family-oriented organization. Over six decades, we have thoughtfully incorporated teams with visionary founders, each bringing diverse talents, all of whom looked to put the client first.

Job Summary

The Paraplanner / Client Service Manager contributes to the team's efforts in the understanding of clients' goals and objectives and in developing personalized, comprehensive financial solutions to help achieve clients' desired outcomes. You will play a vital role in inspiring families, driving financial success and developing strong connections with our clients. You will report to the Director of Wealth.

What You'll Do

- Help with multiple aspects of preparation, development, and implementation of financial plans
- Establish and nurture excellent client relationships through personalized interactions through in-person, telephone, and email communication channels, serving as the primary contact for client account servicing requests.
- Process all updates to account instructions.
- Process transactions, coordinate account funding and administer client cash flow needs.
- Maintain up-to-date client records and document all client interactions and service work to ensure accurate client information.
- Maintain compliance with corporate and regulatory standards while supporting company-initiated projects as needed.
- Work together with the team to provide superior client service
- Support the team with other ad hoc tasks
- Assist with Client meeting preparation, including scheduling, data collection, quality control.
- Work with the entire Fairport Wealth team to ensure alignment between each client's Plan and implementation strategy.

What You'll Bring

- Bachelor's degree in finance or related field
- FPQP Preferred
- 2-7 years of experience in the financial services industry in a client relationship position.
- Excellent written and verbal communication skills, and interpersonal skills.
- Ability to operate independently in dealing with broad concepts and manage multiple priorities
- Knowledge of different investment and financial planning topics and a commitment to client service
- Ability to become proficient in the use of client relationship management and comprehensive financial planning software and technologies
- Experience with Black Diamond, eMoney, Excel and Salesforce CRM are all a plus but not required

Company Culture

Embracing our core values is crucial for a Client Service Manager / Paraplanner, as these values form the foundation for promoting a positive workplace culture. Incorporating these values into daily operations is important for enhancing productivity, building strong client relationships, and nurturing an atmosphere of trust and growth.

Team over Self:

- Collaborative mindset
- Contributor to the greater good
- Sense of shared purpose

Engaged:

- Understanding of goals
- Strive to do the best
- Big-picture thinking
- Thoughtfulness in actions

Initiative:

- Proactive assistance and insight
- Solutions-oriented approach
- Continuous Improvement:
- Commitment to excellence
- Embrace growth opportunities

Empathetic:

- Service-oriented mindset
- Put oneself in the shoes of clients (internal or external)

What We Offer

- Annual base salary of \$70,000-\$90,000 based on qualifications and experience
- Coverage on the first day of employment for Medical, Dental, and Vision insurance
- Paid Parental Leave (16 weeks for primary caregiver and 8 weeks for secondary caregiver)
- 401k Matching Plan
- HSA Employer Contributions
- Student Loan Assistance
- Pet Insurance

AN EQUAL OPPORTUNITY EMPLOYER: Hightower is an equal opportunity employer and does not discriminate based on race, color, religion, sex, sexual orientation, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age (over 40), physical or mental disability, medical condition (cancer-related), gender identity or expression, genetic information including sickle cell or hemoglobin C trait, or any other consideration made unlawful by applicable federal, state, or local law.

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