



Position: Paraplanner

Location: Austin, Texas

Company: Exencial Wealth Advisors

Position Overview

Exencial Wealth Advisors is seeking a dedicated and detail-oriented **Paraplanner** to support our financial planning team. This role focuses on preparing financial plans, managing client workflows, and assisting advisors in delivering high-quality client service.

This is not a business development role or a career track to becoming a financial advisor.

Instead, it is ideal for someone who is passionate about financial planning and thrives in a collaborative role that drives operational excellence.

We're looking for a proactive, highly organized professional who is eager to learn, enjoys tackling complex tasks, and consistently holds themselves to the highest standards.

Key Responsibilities

Collaborate with lead planners and advisor teams to:

- Prepare, refine, and maintain comprehensive financial planning deliverables using eMoney and Microsoft Office tools.
- Maintain accurate financial data for current and prospective clients.
- Create illustrative exhibits and visual aids to support advisor recommendations.
- Research and implement strategies to address unique client scenarios and life events.
- Document critical discussion points and actionable items during client meetings.
- Track and ensure the timely completion of post-meeting follow-up tasks.

Qualifications

- **Experience:** Minimum 2+ years in financial services.
- **Education:** Bachelor's degree in finance, accounting, business management, or a related field.
- **Skills and Attributes:**
 - Solid understanding of planning concepts in the following domains: retirement income, cash flows, investments, estate and income tax, and insurance.
 - Exceptional organizational skills and the ability to manage multiple priorities effectively.
 - Strong ethical standards committed to acting in the client's best interest.
 - Proficiency in Microsoft Office Suite; experience with eMoney is highly preferred.

- Excellent communication skills, including the ability to write clearly and concisely.

WHY JOIN EXENCIAL WEALTH ADVISORS?

At Exencial, we believe in the power of teamwork and operational excellence to deliver exceptional client experiences. As a Paraplanner, you'll play a key role in ensuring our clients receive the personalized attention they deserve.

This role offers opportunities for professional development and specialization in financial planning without the expectation of business development, marketing or sales activities.

ABOUT EXENCIAL WEALTH ADVISORS

Exencial Wealth Advisors is a comprehensive financial planning firm that provides advice on investment management, tax, financial planning, and estate planning. We prioritize our clients' needs because we believe their success drives ours.

Exencial manages \$5.2 billion in Oklahoma, Texas, North Carolina, Connecticut, Florida, California, and Ohio, and it has around 107 employees. We are pursuing growth both organically and inorganically as we focus on building a great company with great people and driving great results.

Please send resumes to djohnson@exencialwealth.com.