Paraplanner / Associate Financial Advisor

Full-Time | Cranberry Township, PA

About Hoffman Capital Advisors

Hoffman Capital Advisors is an independent Registered Investment Advisor (RIA) based in Cranberry Township, PA serving individuals, families, businesses, and non-profits through financial planning and investment management. We believe financial advice should be practical, personal, and fiduciary in nature. Our role is to come alongside clients and provide guidance, clarity, and confidence as they make financial decisions and plan for their future. We are building for the future and looking for someone who wants more than a traditional support role. This position is designed for an individual interested in developing into a lead advisor over time while gaining exposure to the operational side of running an independent advisory business.

Position Overview

The Paraplanner / Associate Financial Advisor will support day-to-day operations, financial planning, client preparation, investment management, and business administration while developing technical and client-facing skills. This is a growth-oriented opportunity with mentorship, increasing responsibility, and a path toward advisory leadership.

Responsibilities

Financial Planning Support

- Prepare financial plans and planning analyses
- Gather and organize client data
- Build retirement, tax, insurance, and cash flow scenarios
- Prepare meeting materials and planning recommendations
- Participate in client meetings and follow-up execution

Investment & Advisory Support

- Assist with portfolio implementation and account maintenance
- Support investment research and portfolio reporting
- Help monitor client action items and service requests

Operations & Compliance

- Maintain CRM records and workflows
- Coordinate account paperwork and operational requests
- Assist with project tracking and workflow management
- Contribute to improving firm systems and efficiency
- Support compliance documentation and internal processes

Qualifications

Preferred:

- Bachelor's degree in finance, economics, accounting, business, or related field
- 1-4 years of experience in wealth management, financial planning, banking, or related field
- Strong analytical and communication skills
- High attention to detail and desire to learn
- Willingness to pursue CFP® certification within 2-3 years

Strong Plus:

- CFP® candidate or CFP® coursework already completed

- Series 7 & 65/66 licensed, or willingness to obtain
- Experience with financial planning software and various custodial/reporting platforms

What Success Looks Like

Within 12-18 months, this person independently prepares planning deliverables, runs portions of client meetings, manages operational workflows with minimal supervision, and demonstrates readiness for increasing client responsibility.

Employee Benefits

- Competitive salary and revenue payout structure + bonus opportunity.
- Customized long-term career growth plan with personal coaching.
- Immediate access to SIMPLE IRA plan with a 3% company match.
- 2 weeks (Year 1) of paid vacation/personal/sick days, in addition to all Federal holidays.
- Free personal financial planning & investment management.
- Healthcare coverage negotiable.
- Part-time remote work negotiable based on tenure and performance.

Compensation Ranges

Experience Level	Year 1 Salary	Year 2 Salary
Entry Level	$50,000	$55,000 plus bonus eligible
RIA/Wealth Management Experience*	$60,000	$70,000 plus bonus eligible

* Candidates with significant RIA and/or Wealth Management experience, specialized skills, or exceptional qualifications may be considered for compensation outside of these ranges.