



# Employment Advertisement

**POSTED: January 17, 2014**

## **Paraplanner**

Two Rivers Insurance Investment Services is looking for a dynamic professional to fill a Paraplanner position. The Paraplanner will provide analytical support to the nationally recognized investment sales office of retirement expert Curtis V. Cloke, CLTC, LUTCF. This position does not require outside sales. The Paraplanner will be responsible for collecting, organizing, and analyzing client data to identify solutions to maximum client retirement plans, portfolio allocation, asset management and performance.

The ideal candidate will be a self-starter with the following skills:

- Displays a strong sense of ownership; extreme attention to detail; sound organization skills; and a positive, professional attitude and demeanor
- Demonstrated analytical ability, good judgment and problem solving skills, the ability to meet tight deadlines and prioritize objectives
- Strong knowledge of MS Office Suite (with excellent Excel skills); and the ability to learn proprietary software tools to be used for retirement analytics
- Knowledge of investments, taxation of assets classes, investment & securities and the ability to comply with fiduciary responsibilities
- Must demonstrate a high degree of personal integrity, honesty and the ability to handle confidential information

## **Qualifications**

- Bachelor's Degree in Financial Planning, Finance or Business Administration from an accredited college or university preferred or 10 years of relevant work experience.
- Formerly or currently a Certified Financial Planner® or currently CLU and CHFC certified with 3-5 years of relevant experience and/or training in financial services industry preferred

If you possess high energy and strong leadership qualities and are committed to exceptional customer service, please forward your resume to:

[kaugustine@tworiversins.com](mailto:kaugustine@tworiversins.com)

or

Two Rivers Insurance Services  
Attn: Human Resources  
214 N. Main St.  
Burlington, IA 52601

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