Yeske Buie Open Position – Paraplanner

Yeske Buie, one of the most respected and influential financial planning firms in the country, is seeking to hire a self-motivated, organized, and adaptable problem-solver with a resilient, upbeat attitude and a hard work ethic for the role of Paraplanner in our San Francisco, CA office.

About Yeske Buie

On paper, Yeske Buie is an independent, fee-only financial planning firm with over $750M in assets under management. We specialize in helping our Clients safely spend from their portfolios, intergenerational wealth planning, and fundamentally grounded investing that is implemented in a creative and disciplined way.

Beneath the surface, we're much more than that. At Yeske Buie, our mission is to empower people to pursue their limitless vision for their life – we call this their Live Big® life. This mission, along with our six core values, serve as the drivers for how we serve our Clients and interact as a team.

About the Role

The prefix "para" comes from Greek origins and has several interpretations including *alongside* and *beside*. As a Paraplanner at Yeske Buie, you will work to comprehensively support our financial planning team. We envision this support including the following:

- **Meeting with Clients**
    - *Your role will be active listener and a note taker.*
- **Gathering Financial Planning Data from Clients**
    - *This includes drafting and sending Client emails, fielding Client calls, entering Client information into our databases, and creating and managing related tasks.*
- **Preparing and Implementing Financial Plans**
    - *You will turn that collected data into powerful, financial planning reports and recommendations. Your work will be reviewed by the Lead Advisor and posted on a Client's unique Client Private Page®.*
- **Reviewing Client Accounts and Proposing Trades**
    - *Yeske Buie has a grounded investment philosophy. You will be a part of executing this philosophy by proposing trades and rebalancing accounts in line with our processes, and regularly reviewing reports including daily deposits and withdrawals.*

- **Completing Client Service and Administrative Tasks**
    - *This incredibly important (although sometimes tedious and not-so-exciting) work includes reviewing Client transactions, compiling account paperwork and assisting Clients through the completion of the paperwork, moving money, opening/closing accounts, scanning, filing, etc.*
- **Completing Financial Planning and Asset Management Research and Projects**
    - *Sometimes planned, sometimes unplanned, you'll be asked to lean in as a utility player to update our databases, research best practices to improve our processes, and implement new strategies.*
- **Meeting with the Team**
    - *You will primarily focus on individual tasks and responsibilities, although working in teams and sub-teams is very much a part of our culture. You can expect to be in 1 – 2 weekly team meetings.*

About the Ideal Candidate

Someone who will excel in this position will…

- Hold a Bachelor's degree from an accredited college or university
- Have strong analytical and financial skills and be detail-oriented with a high degree of accuracy
- Be able to manage and prioritize tasks and projects through to their successful conclusion
- Take a Client-first approach to their work
- Be adept and savvy with software and technology
    - *Some of the programs we rely on daily include Salesforce, PortfolioCenter, MoneyTree, AdvisorPeak, and Microsoft Office*
- Demonstrate excellent written and verbal communication skills
- Solve problems with instincts to think creatively, be resourceful, and adapt
- Genuinely enjoy supporting others and find collective success to be fulfilling
- Be trustworthy, ethical, hard-working, and professional

About the Future

This position is an opportunity to build a fulfilling, long-term career focused on exceptional client service and technical financial planning support. Your career is your own unique journey, and we look forward to working with you to design and support your personal and professional goals to empower you to pursue your Live Big® life.

We are happy to provide a competitive salary with bonus potential, fully paid (individual) health benefits, 401(k) with company match, financial support for continuing education and certifications necessary for career advancement (including the Financial Paraplanner Qualified Professional℠ designation), company paid FPA membership and conference attendance, a generous vacation policy, and regular team bonding events (i.e., annual staff retreats, social time, etc.).

Additionally, Yeske Buie is pleased to offer employees a hybrid work schedule. All employees are expected to work from our physical offices from Tuesday through Thursday, and may work from their own virtual office on Monday and Friday.

Lastly, in light of the COVID-19 pandemic, it is an expectation that every member of the Yeske Buie team will receive the COVID-19 vaccine and provide proof of vaccination.

What's Next?

We're excited to learn more about YOU! To apply for this position, please send us your resume, cover letter, and short essay answers to the questions below:

- Why do you want to work for Yeske Buie?
- What would you bring to Yeske Buie that is unique and special?
- What would you need from Yeske Buie to reach your highest potential?
- The organizing principle that runs through all aspects of Yeske Buie is ***Live Big®.*** What does ***Live Big®*** mean to you in your life?
- What are your expectations for your development as a member of Yeske Buie?

Please submit your information via email to Jobs@YeBu.com.

For your planning purposes, please see to the timeline below for more information on our entire interview process. Please note that every step of the interview process is not guaranteed to all applicants; you will be moved through the process as far as we see fit.

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Submit Application

- Resume
- Cover Letter
- Essay questions

Initial phone interview with members of Yeske Buie's Hiring Team

Kolbe Index A due prior to call (we will provide you with a coupon code to complete)

Interim Assignment – Round 1

- Listen to two discovery meetings, take notes, send us your notes
- Due 48-hours prior to video interview

Video interview with additional members of Financial Planning Team

Interim Assignment – Round 2

- Review client meeting notes, write follow-up email to client, send to us
- Due 48 hours after it is provided to you

Final Interviews: Meet the Team

Virtual interviews with leadership, the entire Yeske Buie team, and our business consultant

Decision

LIVE BIG