MountainOne
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Paraplanner
MountainOne Investments
(Berkshire County, MA)

About Us:

MountainOne is a mutual holding company headquartered in North Adams, Massachusetts. Banking, Insurance, and Investment products are offered at full service offices in the Berkshires (Pittsfield, North Adams, Williamstown) and on Boston's South Shore (Quincy, Rockland, Scituate). MountainOne is dedicated to the local communities we serve, with a mission of delivering solutions of real value that help individuals, businesses, and community institutions manage their financial lives with clarity and confidence.

- **MountainOne Bank**, founded in 1848, provides a complete array of personal and business banking and electronic services.
- **MountainOne Insurance** provides personal and business insurance, bonding services and group benefits solutions.
- **MountainOne Investments** provides individual investment services and group financial benefit plans (financial professionals offering securities and advisory services through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Advisor)

Position Description:

MountainOne Bank has an incredible opportunity to join our well-established investment team in this Williamstown, MA based role. The Paraplanner will provide support to a senior financial advisor, including gathering client data and organizing and maintaining financial documents. In conjunction with the team, provides superior client service, interacts with key clients, and provides investment advisory support, financial planning and analysis as needed.

Primary Responsibilities:

- Provides exemplary service to clients including individuals and families, endowments, and retirement plans;
- Responds to client questions, concerns, and service requests; documents all interactions;
- Complies with all FINRA/SEC/Commonwealth/MO compliance regulations and policies;
- For the advisor's high net worth clients, helps individuals identify their unique financial needs and objectives;

- Conducts product research when necessary;
- Assists with creation and implementation of workflows and procedures to deliver on superior service coupled with a high level of efficiency, to include client onboarding and client service model;
- Assists with 401k plan meetings, compliance requirements, client deliverables;
- Other duties as assigned.

Qualifications:

- Bachelor's Degree required, preferably in in financial planning, finance or accounting;
- FINRA Series 7, 65 or 66, preferred but not required;
- More than 3 years industry experience working with clients;
- Background or experience in finance, accounting, preferred;
- Works well both independently and with a team;
- Excellent organizational skills and attention to detail;
- Skilled at conducting research, analyzing statistics and writing reports;
- Ability to identify, meet and follow through with client needs and requirements with keen attention to detail;
- Willingness to enroll in a professional licensure/designation program, a plus;
- Knowledge of financial planning concepts, terminology, products and services;
- Excellent written and verbal communications skills;
- Strong analytical skills;
- Proficiency with the Microsoft Office Suite, and client contact management software;
- Maintain a high level of professionalism and confidentiality;
- 25% availability to travel outside of a 25-mile radius;
- Ability to sit, drive and perform telephone, calculator and computer input functions.

To Apply:

Please visit our careers page to apply! https://mountainone.com/content/careers

MountainOne is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, age, disability, or veteran status. (Compliant with VEVRAA and Section 503 rules)