

## **HOKANSON ASSOCIATES JOB DESCRIPTION**

**Position Title:** Paraplanner  
**Reports To:** Director, Client Service  
**Date:** June 23, 2010

**Basic Objective:** This non-exempt part-time position is responsible for providing financial planning support to the Client Service department.

- Use of confidential client data and records, Firm software and other tools to produce reports, calculations and prepare recommendations on a wide variety of financial planning issues.
- Support Relationship Lead in financial planning cases and servicing their clients
- Experience and capable of using financial planning software such as: MoneyTree, Morningstar Principia, CCH Roth IRA conversion program, BNA Tax planner, Total Planning Suite, etc.
- Ability to research financial planning issues.
- Other duties/financial planning projects as assigned.

**Background and Experience Required:**

- Undergraduate college degree (B.A. or B.S.) with related experience in Finance, Accounting, Financial & Tax planning preferred.
- CFP or minimum of 3-5 years of equivalent professional experience.
- Ability to communicate effectively/proficiently in writing.
- Detail-oriented, analytical, self-motivated and organized individual required .
- Position requires approximately 10 hours weekly; possibly additional hours on an 'as-needed' basis.
- Position can be performed from home the majority of the time, however, individual must have the ability to come to office when necessary or required.
- If performing the position at home, the individual must provide their own system(s) and those system(s) must meet our basic specifications to launch the required software, which would be outlined.

For consideration, please e-mail cover letter and resume to:  
ha@hokansonassociates.com.