Financial Freedom For Dentists

Paraplanner | Snoqualmie, WA | Full-Time

☑ Are you driven by purpose, precision, and the opportunity to do work that impacts lives?

☑ Do you want to work alongside CFP® professionals in a fee-only firm that takes the fiduciary responsibility seriously -- helping our clients achieve financial freedom through time-tested principles of financial planning and investment management?

☑ Are you a proactive problem-solver who takes ownership—treating each client's financial plan as if it were your own—who thrives in a role that directly drives client outcomes, retention, and trust?

Why Join Us?

- **Flexible Schedule & Work/Life Balance:** More than just a good idea, it is the way we work and live in our family-friendly team in Snoqualmie, WA (exit 25 off I-90).
- **Integrity & Impact:** Work in a fiduciary role where trust, expertise, and communication drive everything we do. We are a fee-only financial planning firm specializing in helping dentists—especially practice owners receive comprehensive financial planning. Our clients rely on us to help them navigate complex financial lives with clarity and confidence through debt management, tax strategy, investment management, retirement plan design, and long-term wealth planning.
- **Growth & Career Development:** You will gain hands-on experience across all areas of comprehensive financial planning. Your input matters, and your contributions directly impact our clients, operations, and company growth. This is the typical financial planning career track for our firm:

  Client Services → Paraplanner → Associate Advisor
  → Lead Advisor → Senior Advisor

Why this Role Matters?

We are seeking a Paraplanner who loves connecting the dots, building actionable plans, and ensuring no detail is missed. Dentists face uniquely complex financial decisions:

- High income… but often delayed wealth accumulation
- Significant student loan and practice debt
- Tax complexity and missed planning opportunities
- Uncertainty around when they can actually retire

This is not a back-office role. You are a core part of the client relationship and will play a critical role in helping transform client financial plans into actionable, trackable strategies that help move clients toward financial freedom. This role represents a critical stage in the advisor career path:

- Supporting lead advisors to ***increase capacity and deepen relationships***
- Delivering ongoing service that ***clients actually feel and value***
- Ensuring financial plans are ***implemented, monitored, and improved over time***

Key Responsibilities:

As fiduciaries serving our clients with a high level of ***trust, communication*** and ***expertise***, a Paraplanner supports lead advisors in all areas of the client relationship and ensuring the action plans empower clients to reach their unique financial goals.

Financial Planning & Analysis

- Build and maintain comprehensive financial plans (cash flow, net worth, retirement projections)
- Analyze scenarios: debt repayment, major purchases, practice transitions, retirement timing
- Identify planning opportunities across tax, insurance, estate, and investment strategies
- Translate complex data into clear, actionable insights

Investment & Portfolio Support

- Assist in implementing academically grounded investment strategies (e.g., evidence-based, low-cost, globally diversified portfolios)
- Prepare portfolio analysis, performance reporting, and rebalancing recommendations, including managing trades.
- Support tax-efficient investment strategies and asset location decisions
- Together with the Client Service Administrator, manage data management of client information & support Financial Advisor(s) in onboarding and maintenance of client relationships overseeing investment paperwork, communicating with clients and the investment custodian

Retirement Plan Design (for Practice Owners)

- Support design and analysis of retirement plans (e.g., 401(k), profit-sharing, defined benefit/cash balance plans)
- Model contribution strategies to maximize tax savings and long-term wealth
- Coordinate with third-party administrators and CPAs

Client Experience & Plan Execution

- Implement strategies to maximize tax savings and long-term wealth and follow-up with Action Plans-- track progress toward client goals, complete tasks to ensure follow-through on recommendations
- Develop & maintain standardized proposals, presentations and resource library
- Participate in regular team meetings and annual business planning strategy sessions as requested.
- Maintain strong compliance documentation related to research and trading
- Additional responsibilities as assigned to facilitate growth and opportunity

What Success Looks Like—

- Financial plans are clear, accurate, and actionable
- Advisors are fully prepared and confident in every client meeting
- Clients experience measurable progress toward their goals
- Opportunities are proactively identified—not missed
- We are a small firm, and you will have crucial responsibilities to help us grow as part of the Client Services, Compliance, Growth & Engagement, Finance, and Technology teams.

Qualifications:

- Bachelor’s degree in Financial Planning, Finance, Economics, or related field preferred
- CFP® coursework completed or planning to complete preferred
- Series 65 certification (or willingness to obtain within 6 months)

- 1+ years in financial planning role (preferred)
- Proficient in Excel, Outlook, Word, CRM software, and comfortable with technology & familiarity with financial planning software (e.g., eMoney, RightCapital, MoneyGuidePro).
- Strong analytical skills, highly organized, detail-oriented, and process-driven with strong problem-solving skills
- A proactive, team-player mindset with strong communication skills
- Ability to multitask, prioritize, and work independently in a fast-paced environment

What Makes this Opportunity Different:

True Fee-Only, Fiduciary Model: No commissions. No product sales. Every recommendation is made solely in the client's best interest.

Academically Researched Investing: We implement evidence-based strategies rooted in decades of financial research—not speculation or market timing.

Deep Niche Expertise: You will develop specialized expertise working with dentist practice owners—a complex and rewarding client segment.

Real Impact: Your work directly influences— When a doctor can retire, how they balance work, family, and life, and whether they achieve financial independence.

Compensation & Benefits:

Salary: Competitive Salary based on experience

Schedule: Full-time

Benefits: 401(k) matching, health/dental/vision insurance, PTO, paid training, and professional development opportunities (Support for CFP® certification, education & professional development & associations)

Bonus: Performance-Based Bonus Opportunities

Environment: Collaborative, mission-driven team environment

Apply If You Want to…

☑ *Be part of a firm where clients come first—always*
☑ *Help dentists achieve financial freedom*
☑ *Turn great advice into transforming: "Here's your plan…" → into → "Here's your progress."*

Apply Today: *Send your resume & cover letter to Apply@Freedom4Dentists.com*