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## News

### Moore Wealth paraplanner enjoys face-to-face communication

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By **Ed Waters Jr.**  
News-Post Staff

Just as the legal field has paralegals to help with support services, so does the growing financial planning profession.

Jane Helm is a paraplanner at Moore Wealth on Carroll Creek Way.

"As a paraplanner, I support Shabri Moore in all aspects of the operation of her practice," said Helm, who is licensed in general securities and life and health insurance.

Moore said there are not many paraplanners in Frederick.

"They have the same licenses as a financial planner, but tend to do the back office work," she said.

Paraplanners need to be computer-savvy, work well with clients and do follow-ups, Moore said.

"She can do what I can do, but I do have additional licenses," Moore said.

Helm graduated from □Salisbury University (then known as Salisbury State College) in 1981 with a bachelor's degree in social work.

"My goal was always to have a career which enabled me to have a lasting, positive effect on



Photo by Bill Green

Jane Helm, right, a senior paraplanner at Moore Wealth Inc., stands next to Shabri Moore, the firm's founder, in their Carroll Creek Way offices.

people's lives," Helm said.

"I entered the business world shortly after graduation and always gravitated toward positions that had direct contact with clients," she said.

"My favorite aspect of the career is meeting clients face to face. I truly enjoy the human side of financial services."

She said she found her niche in paraplanning. "I perform research, prepare client documents and have a lot of client contact by phone."

But Helm does have the ultimate goal of becoming a certified financial planner, she said, which can take years of acquiring experience and licenses.

Moore said having Helm on the staff is an add-on for clients.

"They are getting two minds to work for the same cost, clients get more without paying more," Moore said.