Company: Mercer Advisors
Position: Client Advisor
Location: Walnut Creek, CA 94596

We are also hiring in San Francisco and Silicon Valley.

Company Overview:

Mercer Advisors is a fee-only, independent RIA whose purpose is helping our clients achieve Economic Freedom. Established in 1985 as one of the nation's first fee-only financial planning firms, we have a rich legacy of operating exclusively as a fiduciary. Unique to many RIAs we offer a full-suite of services all in house for our clients including investment management, financial planning, estate planning (in-house law firm), tax planning and preparation (on staff CPAs) and trustee services. With over $11 billion in assets and 8,000 clients we are growing rapidly through both organic and inorganic growth (11 acquisitions in last two years). We are looking for talented, motivated people like you who can add to the growth of our business and culture.

For more information on Mercer Advisors, please visit http://www.merceradvisors.com.

Job Summary:

Listening, educating and providing clarity to clients is what you love. Our ideal candidate thrives on being a trusted advisor, is passionate about helping others, has an entrepreneurial spirit and believes strongly in providing exceptional client service. As a Client Advisor, you will work in a client-focused, team-centered environment to support the team's region-wide client service and business development efforts. This is a salaried, non-sales financial planning/wealth management position. In this role, you will collaborate with subject matter experts nationwide and be part of one of the largest fee-only wealth management firms in the United States.

Essential Job Functions for the Client Advisor will include:

- Function as the primary trusted advisor to the firms high net worth clients
- Ensure retention of the firms clients as well as generating referrals
- Support the teams Regional Vice Presidents and Managing Directors as a subject matter expert in the areas of investments, tax planning, pension planning, estate planning, insurance, retirement planning and general financial planning
- Provide cutting edge financial planning, tax, estate, and investment advice to the firms high net worth clients
- Analyze, draft, edit, and deliver comprehensive financial plans to clients
- Analyze prospective clients investment portfolios and financial planning to support RVPs in introducing new clients to the firm
- Manage client communications and follow-up with clients other advisors
- Ensure adherence to company standards of net new asset growth and retention
- Attend company workshops or lectures and speak to groups of potential clients when called upon
- Other duties as assigned

Required Knowledge, Skills and Abilities:

- Bachelors or Masters Degree
- Minimum 5 years of client-facing tax, wealth management or financial planning experience
- Series 65 or Series 66 license required unless candidate holds one of the following credentials: Certified Financial Planner (CFP®), Chartered Financial Consultant (ChFC), Personal Financial Specialist (PFS), Chartered Financial Analyst (CFA) or Chartered Investment Consultant (CIC)
- CFP® credential strongly preferred
- Sales aptitude and experience is also highly desired
- Excellent communication, presentation, listening, and analytical skills
- Proven time management and organizational skills in high volume, high energy environments
- Strong knowledge of and the ability to present investment, finance, insurance, and tax planning concepts
- Must be a humble, entrepreneurial, hardworking team player with a positive, can do attitude
- Strong computer aptitude with proficiency in MS Excel, Word, Outlook, and PowerPoint
- Ability to learn quickly and efficiently

Working Conditions: Professional or home office environment depending upon location, daytime hours, working inside, standing, and sitting, no heavy lifting over 10 lbs. Up to 50% travel as needed.

Benefits: We can offer you an exciting, fast-paced working environment, and the opportunity to play a vital role in our growth. Mercer Advisors is an equal opportunity employer offering a competitive salary and benefit package.

To Apply

Interested candidates please submit an application via our career website: http://www.merceradvisors.com/careers

For more information on the position, please email jennifer.mcbride@merceradvisors.com.