Waypoint Wealth Partners
Associate Wealth Manager

We are a dynamic, rapidly growing independent wealth management firm in San Francisco that offers comprehensive wealth management services to individuals and families. We specialize in working with successful families in their peak career years and peak parenting years, addressing the myriad of decisions facing this demographic.

We are seeking to add a new team member to support our advisors and provide exceptional service to our expanding client base. We need an outstanding person. A problem solver with a keen attention to detail. Someone with excellent verbal and written communication skills and a positive, can-do attitude.

Duties & Responsibilities:

- Assist advisors in preparing for client meetings, takes notes in client meetings and providing detailed follow up directly to the client
- Gather client information and create or update planning projections
- Perform various analysis (for example, education funding, stock options, insurance needs, etc.) and document and communicate recommendations
- Assist clients with the implementation of recommendations, working with CPAs, attorneys, or other professionals as needed
- Update CRM with action items and notes so we always have a complete client record
- Help develop tools and templates to assist with the efficient delivery of our service offering
- Cross train with client service associate on portfolio management systems and custodial platforms
- Contribute to a professional and energetic working environment

Skills & Qualifications Required:

- 2+ years of work experience wealth management industry preferred, college degree
- Ideal candidate will have their CFP or be enrolled in a CFP program
- Personable, responsive, engaging, and a client first attitude
- Mature, self-starter, willing to take complete ownership of areas of responsibility
- Ability to work independently and take direction from multiple parties
- Good problem solving skills and attention to detail
- Strong computer skills including advanced proficiency with Word and Excel
- Experience with CRM and portfolio management software is highly desirable

WAYPOINT
WEALTH PARTNERS

Salary and Benefits:

The firm offers comprehensive benefits that include:

- Compensation commensurate with skills and experience
- 15 days paid vacation and 10 paid holidays
- Quarterly bonus program
- 401k plan and employer profit sharing contribution
- Medical, dental, and vision insurance
- Ability to purchase long-term disability and life insurance at group rates
- Professional development budget
- Good work life balance
- Complimentary financial planning and investment management for you and your direct family members

Applications:

- Qualified applicants should submit a cover letter and resume to admin@waypointwp.com