**Waypoint Wealth Partners**
**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 believe passionately in the value of deep financial and life planning being integrated with investment management services. We specialize in working with successful individuals and 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 Wealth Manager to our team to manage a subset of the firm's clients. There are no business development responsibilities, but this role is expected to be the lead advisor on a number of new and existing relationships. All clients are clients of the firm and Wealth Managers lead a team that includes Associate Wealth Managers, Client Service Associates, and investment management professionals. We need an outstanding person and a solid team player. A problem solver with a keen attention to detail and deep knowledge in all aspects of financial planning. Someone with excellent verbal and written communication skills and a positive, can-do attitude.

**Duties & Responsibilities:**

- Be the primary trusted advisor for clients and help them brainstorm and problems solve a wide variety of issues (for example: evaluate job opportunities, compensation plans, new home vs. remodel, etc.)
- Engage with clients to understand their life experience, their current situation, their aspirations, goals and develop strategies to help them get there
- Facilitate conversations among spouses, family members, and outside professionals
- Develop various scenarios or paths to success and discuss the pros/cons/risks of each path with clients
- Prepare for client meetings and provide detailed follow up
- Gather client information and create or update planning projections
- Perform various analysis and modeling (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
- Help develop tools and templates to assist with the efficient delivery of our service offering
- Contribute to a professional and energetic working environment

**Skills & Qualifications Required:**

- 5+ years financial services industry experience and college degree
- Ideal candidate will have their CFP or be enrolled in a CFP program
- Good problem solving and technical skills and keen attention to detail
- 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
- Strong analytical skills and computer skills including advanced proficiency with Excel and Word

**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