

Firm Overview

Founded in 1999, ZRC Wealth Management, LLC is a Northern California based Registered Investment Advisor that provides investment management and financial planning services to discerning individuals, families, and companies across the United States. As an independent and privately held firm – ZRC specializes in helping investors grow, manage, and protect their wealth. As a Fiduciary, ZRC is dedicated to putting our clients' best interest first.

ZRC is fee-only – meaning we are solely compensated by our clients – reducing conflicts of interest and aligning their goals with ours. With offices in Santa Rosa, Walnut Creek, and St. Helena, we serve more than 140 clients throughout Northern California and across the globe. These clients entrust us with more than \$200 million of assets to manage. We manage investment portfolios based on Nobel-prize-winning academic research, and primarily structure our portfolios with factor-based mutual funds (such as those pioneered by Dimensional Fund Advisors, given their lower costs and long-term expected performance) and ETFs.

Job Description

The value in ZRC's services are;

- Independent, expert financial advice.
- World class service.
- Exceptional results.

Therefore, we seek to hire professionals of the highest caliber and with a client-first mentality. We are currently seeking to add another exceptional employee to our team. This person will be based in our Walnut Creek office. We believe in offering a rewarding and personally fulfilling career path with a work-life balance.

Job Summary – Director of Financial Planning / Wealth Advisor

The Director of Financial Planning will be responsible for the development, design and implementation of comprehensive financial plans as well as other wealth planning services and deliverables. 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. The position offers an excellent opportunity for an individual seeking to continue their career in financial planning with the option of becoming a Senior Wealth Advisor. This is a salaried, non-sales financial planning/wealth management position. Responsibilities range from financial planning, trading and portfolio management, back office operations, and being the first point of contact for clients.

Duties and Responsibilities

The Director of Financial Planning / Wealth Advisor can expect to focus in the following areas:

- Meet and speak with clients with the Senior Wealth Advisor, develop and deliver comprehensive financial plans.
- Analyze prospective clients' investment portfolios and financial plans.
- Manage client communications and follow-up with clients' other professional advisors.

- Client meeting support – schedule meetings, prepare materials and follow up with clients after meetings.
- Trading and portfolio management (using industry leading software).
- Be involved in the financial planning profession, local FPA chapter, and attend conferences to ensure the firm is at the forefront of the profession.
- Manage client information – prepare client reports, submit and follow up on necessary paperwork, regularly update CRM.
- Develop, maintain and improve systems for monitoring workflows.

Qualifications

The Director of Financial Planning position typically requires the following qualifications:

- Personable, warm, engaging, empathetic, poised, and diplomatic.
- Certified Financial Planner™ professional.
- Minimum two years' experience developing plans on a leading financial planning software (such as MoneyGuidePro or eMoney) and presenting them to clients.
- Excellent written and verbal communication skills.
- Problem-solving, solutions-oriented approach.
- Must be organized, meticulous, detail-oriented and able to multitask
- Team player, able to interact well with clients and all levels of the firm
- Desire/ability to work successfully in a small company environment.
- Highly technology savvy with proficiency in Word, Excel, PowerPoint, email, CRM, and other programs.
- Four-year college degree.
- Professional appearance and etiquette.
- Experience with broker/ dealer custody operations (such as Schwab Advisor Services, Fidelity Institutional, TD Ameritrade Institutional, or Pershing) a major plus.
- Experience with rebalancing software such as Tamarac, iRebal, TradeWarrior, RedBlack, or Morningstar TRX a major plus.
- Knowledge of investments and financial markets.
- Existing clients not required, but a major plus.
- Prospective candidates will be required to present a detailed financial plan to the rest of the team.

Salary and Benefits

ZRC Wealth Management seeks exceptional employees. Therefore, it is the philosophy of the company to employ a compensation plan to reward exceptional performance.

- Compensation consists of a base salary (\$100k or more based upon experience, qualifications, and if existing clients are brought over) plus generous individual performance bonus and company performance bonus.
- Generous benefits include four weeks of vacation your first year, health insurance, and participation in our 401(k).
- Financial support for professional accreditation/continuing education requirements and other education/training opportunities.
- Opportunity to take-on additional responsibilities and grow professionally as the firm grows.

- Full time position with the possibility of a flexible schedule that could involve telecommuting.
- You will have your own private office.
- Candidates will be required to provide professional references and undergo a background check.
- ZRC appreciates the value of a balanced life.

Applications

Qualified applicants should submit a **cover letter and their resume** to ZRC Wealth Management at admin@zrcwm.com.

ZRC Wealth Management is an Equal Opportunity Employer