TEAMHEWINS℠
COUNSELORS TO FAMILY WEALTH

203 Redwood Shores
Parkway, Suite 550
Redwood City, CA 94065

Phone: 650.620.3040
Fax: 650.372.0813
Email: info@teamhewins.com

teamhewins.com

Job Posting

Lead Financial Advisor

Location: Redwood City, CA or San Francisco, CA

Do you enjoy helping successful people with complex financial needs find the peace-of-mind they deserve? Do you live to serve? If so, we should talk.

Team Hewins is a fee-only Registered Investment Advisor (RIA) with a strong leadership team, a proven process for serving clients, and an entrepreneurial bent. Our Principals and employees, most of whom have worked together for years, are deeply committed to our fiduciary model as an independent planning firm, 100% employee owned. We live to serve successful people with complex financial lives, and we are looking for Financial Planners who share our core values and commitment. If this is you, we want you to join our team!

As a member of our team, you will be delivering the personalized service that is our hallmark. You will:

- Provide exceptional financial planning and investment advisory services to our clients, enabling them to achieve their personal/family and charitable goals.
- Engage with clients to understand their needs and goals and develop deep, lasting relationships in the context of a successful long-term planning process.
- Enjoy the strong support of our marketing, operations, investment and management teams and processes, so you can keep your focus on clients and prospects.
- Collaborate with clients' other professional advisors and coordinate clients' complex financial lives so they can relax and enjoy their success.

As part of our growth process, you will:

- Develop and nurture relationships within the Schwab Advisor Network (SAN) that result in a steady stream of ideal client referrals.
- Identify and develop relationships with a few select Centers of Influence (COIs).
- Enjoy training that enables you to easily encourage warm referrals from clients
- Participate in our marketing processes, which will enable you to develop as a thought leader and communicator

Are You the Right Fit?

You are our ideal candidate if:

- You are passionate about helping people and are dedicated to exceeding client expectations
- You love being part of a team and actively engaging with other team members to bring our best to clients

203 Redwood Shores
Parkway, Suite 550
Redwood City, CA 94065
Phone: 650.620.3040
Fax: 650.372.0813
Email: info@teamhewins.com
teamhewins.com

- You are committed to excellence and will accept nothing less
- You have strong financial planning skills and a good understanding of investments
- You have a bachelor's degree in Accounting or Finance (preferably) and have earned the CFP® designation. A CPA is a plus.
- You have 2-10 years' experience or more in the financial services industry, preferably with a Registered Investment Advisor.
- Leadership and mentoring skills are always welcome, as is a track record of business development success. You may or may not have strong "sales skills", but you are willing and able to participate in our growth process, with a lot of training and the team supporting you.

What Do We Do?

We serve successful people as financial counselors, attending to the unique needs of each family, coordinating closely with their other professionals, and implementing strategies to manage the financial complexity that is the natural result of their achievements.

Our clients are preparing for life after business, protecting the family legacy they've worked so hard to build, and giving back to the community/charity. They require comprehensive planning, resources, expertise and attention to articulate their goals and achieve them. We create lasting relationships and provide ongoing support. We always act in our clients' best interests.

What Do We Offer?

We offer the right people the opportunity to join an entrepreneurial firm committed to the personal and professional growth of each team member and to maintaining a positive, encouraging working environment. We respect each other and enjoy working together. For the best professionals, opportunities are limited only by your talent and drive, and strong performers who embrace our core values and culture can become Principals of the firm and share all the benefits of ownership.

We offer a comprehensive benefits and perks package which includes:

- 401(k) plan with an employer match
- Competitive health insurance options, with a generous employer contribution
- Flexible Paid Time Off (FTO) program
- Educational reimbursement
- Employee engagement platform for recognition and rewards
- Health and wellness benefit
- 4:00 office closure on Fridays
- Beautiful office with onsite gym and more

If this is you, we want to hear from you! Please contact us at: https://teamhewins.applytojob.com/apply.