WAYPOINT
WEALTH PARTNERS

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 Associate Wealth Manager to our team 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.

<u>Duties & Responsibilities</u>

- Partner with and support the Wealth Managers on 50-60 client relationships to best serve our clients and help them make sound financial decisions
- Have a working knowledge of your clients and manage all client data in the WWP systems
  - Update CRM with action items and notes so we always have a complete client record
  - Update client roadmap before and after client meetings or as client updates occur
  - Maintain and organize client file
- Ensure all client tasks, requests and communications are taken care of on a timely basis
- Prepare and execute on all custodian paperwork and money movement requests
- Oversee and manage the client onboarding process for your clients
- Assist advisors in preparing for client meetings, take notes in client meetings and provide detailed follow up directly to the client
- Gather client information and create or update planning projections
- Assist clients with the implementation of recommendations, working with CPAs, attorneys, or other professionals as needed
- Perform various analysis (for example, education funding, stock options, insurance needs, etc.) and document and communicate recommendations
- Help develop tools and templates to assist with the efficient delivery of our service offering
- Contribute to a professional and energetic working environment

<u>Skills & Qualifications Required</u>

- 2+ years of financial services industry experience and 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 Excel, PowerPoint and Word
- Experience with WWP software programs is highly desirable
  - Redtail CRM, Schwab, Fidelity and Tamarac/Advisor View

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