Waypoint Wealth Partners
Director of Investments

About Us

We are a dynamic, rapidly growing independent wealth management firm based in the Bay Area, offering comprehensive wealth management services to individuals and families. Specializing in guiding successful individuals and families through their peak career and parenting years, we address the myriad of decisions facing this demographic.

Position Overview

We are seeking an exceptional Director of Investments to join our team and support our firm, advisors, and clients. We need an outstanding individual with a talent for problem-solving, a meticulous attention to detail, and deep expertise in investment management.

Duties & Responsibilities

Investment Strategy and Execution

- Collaborate with the Chief Investment Officer (CIO) across all aspects of our investment management offering, including strategy development, strategic allocation, portfolio construction, manager selection, and execution/implementation across our client base.
- Assist in model portfolio construction and ongoing management, considering factors such as asset class selection, weighting, geographic and factor tilts, tailored to client demographics and goals.
- Act as a key member of the Investment Committee.
- Manage relationships with fund managers and separate account managers.
- Serve as a backup trader and provide support to the head of trading as necessary.
- Support the Chief Compliance Officer (CCO) on all investment-related compliance activities.
- Continuously review and update investment solutions, positioning, messaging, and firm presentations.

Advisor Education & Support

- Aid the CIO and advisors with research, analysis, and presentation materials to address client inquiries.
- Support business development efforts by analyzing prospects' current investments, articulating the value of our investment solution, and showcasing our expertise in investment management.
- Provide ongoing investment education to the entire team.
- Serve as the “go to person” for advisors who have investment related questions.

Skills & Qualifications

- Minimum of 3 years of investment management experience.
- Bachelor's degree required.
- Demonstrated ability to confidently present a point of view.
- Proven track record of communicating complex investment topics to clients with limited investment knowledge.
- Exceptional organizational skills with strong systems orientation.
- Ambitious, career-oriented individual who thrives in an entrepreneurial environment.
- Personable, responsive, engaging, with a client-first attitude.
- Mature, self-starting professional willing to take ownership of assigned responsibilities.
- Strong analytical and computer skills, including advanced proficiency in Excel, Word, and PowerPoint.
- Schwab, Fidelity, Tamarac and Morningstar experience helpful but not required.
- Excellent written and verbal communication skills

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Salary and Benefits

- Competitive compensation package with cash compensation $150K - $185K.
- 100% remote work with in-person Team Retreats at least 3 times per year.
- 20 days paid vacation and 11 paid holidays.
- 401k plan with employer contribution.
- Medical, dental, and vision insurance coverage.
- Option to purchase long-term disability and life insurance at group rates.
- Professional development budget.

Applications

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