WORLDVIEW
WEALTH ADVISORS

Associate Wealth Advisor

We are an independent fee-based investment firm serving globally oriented families from our offices in San Francisco, Portland and Amsterdam. We are searching for a talented and motivated individual to join the team in our San Francisco, CA office.

We offer personalized financial planning and build globally oriented ETF-based investment portfolios with a special focus on serving cross-border families – both international families living in the U.S. and Americans living abroad. Because of our unique niche, we are exposed to a diverse set of financial issues which make our work especially interesting and rewarding.

We are a small fast-growing company serving an interesting niche of families, who are generally located along the West Coast and internationally. Many of our clients are originally from a foreign country, so it is important that our staff be comfortable communicating with a multicultural client base. Candidates with international backgrounds or experience are strongly encouraged.

Duties and Responsibilities
The Associate Wealth Advisor role will assist our Wealth Advisors in the creation of complex and comprehensive financial plans for our clientele. This is a professional position of which the Associate Wealth Advisor will be involved in the entire client engagement (relationship management development and support) and will be encouraged to grow into the Wealth Advisor role. The entire team is available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions. Additionally, as a new pair of eyes the Associate Wealth Advisor is expected to actively contribute to the improvement of Worldview's processes and procedures.

This is not a sales position; however, strong networking and relationship building skills are fundamental to the role. We are looking for an individual that works well in a team environment, delivers superior client service, and gives financial advice focused solely on the client's best interests.

This person will be in frequent contact with clients and prospects; an outgoing and positive personality is a must. This person should have solid experience in a client-facing role in the personal financial advisory industry – experience within an independent advisory firm is especially valuable. This person will enjoy significant opportunities for growth and advancement.

Responsibilities include:

- **Financial Planning**: Participate in all areas of client meeting preparation through follow up, including running reports, developing financial plans and making client recommendations
- **Client Service:** Interacting and supporting Wealth Advisors by scheduling and confirming client appointments, and requesting appropriate documents from clients, ensuring high client satisfaction
- **Operations:** Assisting with all non-advisory questions and paperwork, including opening new accounts, asset transfers, producing client reports, trading, managing business applications (CRM, custodian interface, portfolio management software, etc.) and general office support
- **Administrative Support:** Help support the advisory team with prospects and client relationships
- **Portfolio Management:** Prepare and make recommendations on client investments, including portfolio allocation reports. Opportunity exists for more portfolio management responsibilities depending on experience

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Qualifications

- Bachelor's degree or higher in business or related field
- Demonstrate passion for the Financial Planning profession
- Minimum of 2 years working experience in personal financial advisory industry, preferably client facing
- Pursuing CFP® certification
- Positive outgoing attitude is a must, we are a client service focused company
- Superb verbal and written communication skills, well organized and detail-oriented
- A team player with the desire to work in a small, entrepreneurial company
- An appetite for thinking creatively, seeking constant improvement, and voicing one's opinion

Perks

- Competitive Salary + Bonus
- 401(k) with safe harbor and profit sharing plan
- Medical Insurance coverage
- Generous paid time off
- Open and supportive team-based environment

Interested applicants should send a resume and cover letter to jobs@worldviewwealth.com. We will review all submissions and contact only those candidates that meet our requirements. Thank you!

Worldview Wealth Advisors is an Equal Opportunity Employer