WAYPOINT
WEALTH PARTNERS

Waypoint Wealth Partners

Senior Associate Wealth Manager

About Us

We are a dynamic, 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 Senior Associate Wealth Manager (SAWM) to join our team. We need an outstanding individual with a talent for problem-solving, a meticulous attention to detail and a positive, can-do attitude. This new team member will support our advisors and provide top notch service to our clients.

The ideal candidate has at least 2-3 years experience in this support role, the desire to be the lead chair in client relationships, and demonstrates the ability to move into the Wealth Manager role within the first 12 to 18 months.

Duties & Responsibilities

- Partner with and support Wealth Managers on 50 - 60 client relationships to best serve our clients.
- Have a working knowledge for all of your clients and manage all client data in the WWP systems.
- Ensure all client tasks, requests and communications are taken care of on a timely basis.
- Assist Wealth Managers 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, and other professionals as needed.
- Perform various analysis (for example, education funding, stock options, insurance needs, etc.) and document and communicate recommendations.
- Partner with Client Service Associate (CSA) during client onboarding process and with custodian paperwork and money movement requests.
- Be back-up to Client Service Associate (CSA) on all custodian requests.
- Help develop tools and templates to assist with the efficient delivery of our service offering.
- Contribute to a professional and energetic working environment.

Skills and Qualifications

- Minimum of 3 years of financial services experience.
- Bachelor’s degree required.
- Ideal candidate has a CFP.
- Exceptional organizational skills with a strong ability to prioritize and multi-task.
- Personable, responsive and engaging with a client first attitude.
- Mature, self-starting professional willing to take ownership of assigned responsibilities.
- Ability to work independently and take direction from multiple parties.
- Strong computer skills including advanced proficiency with Excel, PowerPoint and Word.
- Redtail, Schwab, Fidelity, Tamarac and RightCapital experience desired but not required.
- Excellent written and verbal communication skills.

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Salary and Benefits

- Compensation commensurate with skills and experience.
- 100% remote work (West Coast hours, Pacific Time Zone).
- In-person Team Retreats at least 3 times per year.
- 15 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.