versant
CAPITAL MANAGEMENT

We’re Hiring: Senior Wealth Associate & Wealth Associate

📍 **Location: Phoenix, AZ**

Ready to Elevate Your Career?

Are you a high performer in the family office or wealth management space, looking for more than just a job? Do you thrive in a fast-paced, client-focused environment where your expertise and leadership truly make an impact? At Versant Capital Management, we’re working to redefine what it means to help deliver exceptional financial guidance, and we’re looking for talented professionals who want to be part of something bigger.

What We Do

Versant is a multi-family office serving high-net-worth individuals and multi-generational families with a holistic approach. Our services go beyond wealth management and investment portfolio management—we integrate tax planning, estate and legacy planning, liquidity and exit planning, retirement planning, family governance and education, risk management, lifestyle/household concierge services, and more.

If you're passionate about working with dynamic clients, solving complex challenges, and driving meaningful change, this is the place for you.

What You’ll Do

As a Senior Wealth Associate (or Wealth Associate, depending on experience), you’ll play a pivotal role in supporting our advisors and clients. You’ll provide technical expertise, client relationship management, and strategic insights to ensure a high level of service.

Key Responsibilities

- Support the Senior Wealth Advisors and Wealth Advisors to help deliver exceptional client service and advice.
- Serve as a key point of contact for clients and their external advisors, ensuring smooth, professional coordination and communication.
- Gather and analyze client data, build financial models, and craft personalized plans that support their long-term success.
- Attend client meetings in a technical support role, contributing meaningful insights while ensuring follow-up actions are executed flawlessly.
- Assist in portfolio analysis, capital sufficiency planning, estate planning, tax planning and performance reporting.

- Use platforms like Junxure, eMoney, Black Diamond, and portfolio accounting tools to streamline processes and improve client outcomes.
- Coordinate meetings, prepare detailed reports, and proactively address client concerns with a high-touch service approach.
- Contribute expertise in specialized areas, improve processes, and be a proactive problem solver in a fast-paced, collaborative environment.

What We're Looking For

We don't settle for average, and neither should you. We're seeking driven, intellectually curious professionals who are ready to challenge the status quo.

Ideal Candidates Will Have:

- Three to five years of wealth management or family office experience
- CFA, CFP, CPA, or JD designation (or working toward one)
- Proficiency in Microsoft Excel, PowerPoint, Outlook, CRM tools (Junxure), eMoney, Black Diamond, and portfolio accounting/trading platforms
- Strong wealth planning skills and technical expertise
- A client-first mindset with exceptional relationship-building abilities
- Excellent communication skills—both written and verbal
- A collaborative, team-oriented attitude
- The ability to thrive in a boutique, high-touch environment

Why Versant?

We're not just another wealth management firm. We're building something extraordinary, and we invest in our people like we invest in our clients.

Culture of Excellence – Work alongside top-tier professionals who challenge and support you.
Clear Career Path – We recognize and reward talent, offering meaningful growth opportunities.
Work-Life Balance – We believe in flexibility and a healthy, balanced career that supports personal and professional success.
National Reach, Boutique Feel – With offices in Dallas and Phoenix, we offer the best of both worlds—big opportunities with a close-knit, collaborative team.

Compensation & Benefits

We know the best talent deserves competitive compensation and meaningful perks. Here's what we offer:

- Competitive salary based on experience, skills, and credentials
- Discretionary bonuses, incentive compensation, and potential equity opportunities
- Generous PTO plus personal/sick time
- Paid holidays
- Hybrid work (in-office, remote, and while traveling)

- Paid health, dental, and vision insurance
- Short- and long-term disability insurance
- Paid parental leave
- 401(k) and profit sharing
- Tuition reimbursement for professional accreditations/certifications and continuing education
- Matching gift charitable donation program
- Paid covered parking
- Team retreats, professional development events, and firm-sponsored outings
- Developmental assistance and leveraging of networks to join nonprofit and other outside boards

This Is More Than a Job—It's a Career Move

If you're looking for a firm that values your expertise, fosters your growth, and challenges you to be your best, Versant Capital Management is the place for you.

We know that top talent comes in many forms. If you don't check every box but believe you have the skills, education, experience, and mindset to excel in this role, we encourage you to apply.

Next Steps

Interested? Join us in helping to shape the future of wealth management. Apply today by emailing your cover letter and resume to connected@versantcm.com.

📍 **Location: Phoenix, AZ**