Client Associate

Versant Capital Management is looking for a financial professional to support our wealth managers in providing a holistic suite of services that encompass all parts of a person's financial well-being, including investment management and financial planning, accounting and tax consulting services, retirement planning, next-generation education, philanthropic and legacy planning, and estate planning, among others.

Job Summary

The Client Associate is an entry-level (0-3 years' experience) client relationship management position that provides technical support for the Senior Wealth Counselor and/or Wealth Counselor. Responsibilities include data gathering, modeling, case design, scenario building, plan development, and presentation development. The Client Associate is also responsible for preparing client reports and maintaining contact with clients to provide or obtain updated information, schedule meetings with preferred staff, and troubleshoot problems. The position may participate in client meetings but not in an advice or decision-making capacity.

Focus Areas

- Communicate with clients and their outside advisors, verbally and in writing
- Deliver superior client service—troubleshoot problems, schedule, and organize meetings; serve as a liaison between Advisor and client as needed.
- Manage client information—prepare client reports, submit, and follow up on necessary paperwork, regularly update Junxure and Mind Maps
- Gather, organize, input, and synthesize client data within a financial planning context
- Prepare client financial plans and presentations for review by supervisors
- Prepare other client deliverables for review by supervisors, i.e., Net Worth Statements, Cash Flow Schedules, Rebalancing Schedules, etc
- Prepare capital sufficiency analysis scenarios
- Review performance reports, including tracking and reconciling of account history
- Attend client meetings in a technical, supporting, and meaningful role
- Provide ongoing, actionable intellectual contributions to work processes and intellectual capital base, focusing on one or two areas of expertise
- Maximize productive use of one or more technology platforms involved in executing other duties and responsibilities

Qualifications

- Three years of professional financial experience
- CFA, CFP, CPA, or MBA (or working toward)
- Series 65 or 66
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, Junxure or other CRM, Mindjet, portfolio accounting, and trading platforms

- Financial planning/wealth management acumen, judgment, and experience
- Excellent communication and listening skills
- Client-first mindset
- Team player with strong mentoring and leadership skills
- Desire/ability to work successfully in a small firm environment

Salary and Benefits

- $60,000 to $72,500, based on experience
- Three weeks (15 business days) PTO, one week (5 days) PST
- Paid holidays
- Flex schedule of work-from-home, in-office, and remotely during travel
- Eligible for discretionary bonus pool and incentive compensation
- Paid health, dental, and vision insurance
- Paid short- and long-term disability insurance
- Paid parental leave
- Cell phone allowance
- 401(k) and Profit Sharing, including a minimum 3% employer match
- Matching gift charitable donation program
- Tuition reimbursement for professional accreditation/continuing education requirements, and other education/training opportunities
- Paid covered parking
- Firm-sponsored outings, professional development opportunities, retreats
- Beautiful office suite in a desirable location in the Phoenix financial district (Biltmore)
- Developmental assistance and/or leveraging of networks to join non-profit and other outside boards

At Versant Capital Management, we strive to achieve a healthy work/life balance. We enjoy celebrating successes and having fun. We're driven to continue building a workplace based on inclusive behaviors and equitable systems, where all employees can feel engaged and share their perspectives as valued members of our team.