VERSANT
CAPITAL MANAGEMENT

# Senior Wealth Manager

*Are you interested in shaping the future of delivering financial advice? Are you adept at helping people solve complex challenges and supporting them through change? Do you want to be part of a team working toward a shared goal? Are you committed to professional development and personal success?*

Versant Senior Wealth Managers focus on 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.

Versant Senior Wealth Managers are the primary managers of our client relationships. They formulate and implement advice and rely on technical specialists to develop recommendations within a given area of expertise. Senior Wealth Managers are expected to develop new client relationships and often work with, train, and supervise other staff in wealth management and client service delivery.

## Focus Areas

- Client relationship development and management, including ongoing and regular client contact and communications
- Wealth management, including managing client workflow and coordination of complete financial plan (analysis, estate planning, tax planning, retirement planning, risk management, portfolio management)
- Leading and collaborating with the client's team of outside experts
- Meet with clients/prospects, and potentially with attorneys and CPAs, or other relevant professionals to obtain information necessary to develop and complete a financial plan
- Develop the client's overall financial plan with alternatives and recommendations, and frame the plan for presentation/delivery to the client
- Client service, including planning updates, portfolio changes and reviews, goals-based performance, and new opportunity identification
- Staff supervision, management, development, and reviews, including oversight and mentoring of client-facing staff, as needed
- Providing ongoing, actionable intellectual contributions to work processes and intellectual capital base, focusing on one or two areas of expertise
- Maximizing productive use of one or more technology platforms involved in executing other duties and responsibilities

## Qualifications

- 10 years of wealth management experience advising high net worth, multi-generational families
- CFA, CFP, CPA, or MBA designation required

- 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

- $150,000-$200,000 depending on experience
- 5 weeks (25 business days) of PTO, 1 week (5 days) PST
- Paid holidays
- Flex schedule of work-from-home, in-office, and remotely during travel
- Eligible for discretionary bonus pool, incentive compensation, and equity opportunities
- Paid health, dental, 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 at the Phoenix financial district
- 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.

**To apply, please send a cover letter and resume to connected@versantcm.com, subject line: Senior Wealth Manager.**