Versant
CAPITAL MANAGEMENT

Senior Wealth Associate

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 Capital Management is looking for a financial professional to support our wealth advisors 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 Senior Wealth Associate is a mid-level (3-5 years' experience) client relationship management position that provides technical support for the Senior Wealth Advisor and/or Wealth Advisor. Responsibilities include data gathering, modeling, case design, scenario building, plan development, and presentation development. The Senior Wealth 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 always in an advice or decision-making capacity. The position may also be the primary contact on small client relationships.

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 liaison between Advisor and client as needed
- Manage client information—prepare client reports, submit and follow up on necessary paperwork, regularly update Junxure (CRM)
- 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
- 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

- 3 to 5 years of professional financial experience
- CFA, CFP, CPA, or MBA (or working toward)
- Series 65 or 66
- Proficiency in Microsoft Word, Excel, PowerPoint, 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

- PTO and 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
- Firm-sponsored outings, professional development opportunities, retreats
- 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 a valued member our team.