versant
CAPITAL MANAGEMENT

Senior Wealth Advisor

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 Advisors focus on a holistic suite of services that encompass all parts of a family's financial well-being, including family office services, 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 Advisors are the primary points of contact for our client relationships. They formulate advice and work with internal and external teams to execute and implement the recommendations. Senior Wealth Advisors play a large part in staff development, training, supervision, and coaching. Additionally, they have an opportunity to have a significant role in business development pursuits.

Focus Areas

- Client relationship development and management, including ongoing and regular client contact and communications
- Coordination, oversight, and accountability for all family office and wealth management service offerings
- Leading and collaborating with the client's team of outside professionals
- 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

- Ten years of family office or wealth management experience advising high-net-worth and ultra-high-net-worth multi-generational families
- CFA, CFP, CPA, or MBA designation required
- 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

- Compensation packages are based on a wide array of factors unique to each candidate, including but not limited to skill set, years and depth of experience, education, and certifications
- 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, and vision insurance
- Paid short- and long-term disability insurance
- Paid parental leave
- Cell phone allowance
- 401(k) and Profit Sharing
- 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
- Developmental assistance and/or leveraging of networks to join a 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.