

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?

The **Wealth Associate** role is an entry-level position (1 to 3 years of experience) focused on client relationship management and providing technical support to Senior Wealth Advisors and Wealth Advisors. This role is ideal for individuals looking to build a strong foundation in wealth management while developing critical skills and experience. Key responsibilities include:

- Assisting with modeling, case design, scenario building, financial plan development, and creating presentations.
- Maintaining consistent communication with clients to update information, schedule meetings, and address concerns.
- Troubleshooting client issues to ensure seamless service.
- Participating in client meetings in a technical support role without providing advice or making decisions.

If you're ready to take your career to the next level in a dynamic and collaborative environment, we'd love to hear from you!

Focus Areas

- Serve as a point of contact for clients and their external advisors, providing clear and professional communication both verbally and in writing.
- Act as a liaison between the Advisor and client to ensure smooth interactions and timely responses.
- Troubleshoot client issues and proactively address concerns.
- Organize and coordinate client meetings, ensuring seamless execution.
- Prepare detailed client reports and ensure accurate documentation.
- Maintain and update client records in systems like Junxure and Mind Maps.
- Gather, organize, and synthesize client data for financial planning purposes.
- Develop financial plans, presentations, and other deliverables, such as Net Worth Statements, Cash Flow Schedules, and Rebalancing Schedules, for supervisor review.
- Conduct capital sufficiency analysis scenarios and assist in reviewing performance reports.
- Track and reconcile account history to ensure accuracy.
- Attend client meetings in a technical support role, providing meaningful contributions to discussions and planning.
- Contribute actionable insights and expertise in one or two specialized areas to enhance work processes and firm knowledge.

- Maximize the effective use of technology platforms to streamline responsibilities and improve efficiency.

Qualifications

- One to 3 years of family office or wealth management experience.
- CFA, CFP, CPA, or MBA designation (or actively working toward one).
- Proficiency in Microsoft Word, Excel, PowerPoint, Outlook, Junxure or other CRM, eMoney, portfolio accounting, and trading platforms.
- Strong financial planning and wealth management acumen, judgment, and experience.
- Excellent communication and listening skills.
- A client-first mindset with a dedication to delivering exceptional service.
- A team player with strong mentoring and leadership capabilities.
- Desire and ability to succeed in a collaborative, small firm environment.

Salary and Benefits

- Competitive compensation package considering factors such as skill set, experience, education, and certifications.
- PTO and 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, 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 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.