Contact: Andy Klausner
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Job Title
Senior Wealth Advisor

Company
Confidential

Location
West Los Angeles, CA

Job Type
Full-Time

Salary
$100,000 - $150,000 plus bonus

Industry
Wealth Management

About the Company
A medium-sized Registered Investment Advisor (RIA) with AUM of just under $900 million; the firm employs just over 20 individuals. The firm's main business is to manage equity, fixed income and balanced portfolios for clients. The firm also provides financial planning for clients as well as having a network of unaffiliated estate and retirement professionals. The firm has an in-house research team (for both stocks and bonds) as well as being an approved user of Dimensional Fund Advisors (DFA).

Job Description
Work as a senior member of an advisor team, lead clients to successfully achieve their financial goals. Provide client service that exceed's the clients expectations. Meet company objectives for sales growth, client retention and customer service quality.

Responsibilities
Working with the team to provide exceptional financial plans, financial advice and reviews to assist clients in achieving their financial goals. Provide leadership and mentor advisory team members, so advice and services are provided in a manner that meets all of the expectations communicated to client. Support (or help create) a team-based environment that builds trust in clients, generates referrals and support the growth of the business.

- Manage existing client relationships
- Facilitate the financial planning process
- Source and close prospects
- Prepare and conduct annual reviews, including both planning and investment topics
- Mentor and train individuals on the team in all technical areas of financial planning and client service

Experience and Qualifications

- 4-year degree; business, finance, economics preferred
- CFP designation, or equivalent
- Series 7,65 (or 660 preferred
- Insurance Licenses
- Substantial wealth management industry experience