A Legacy of Trust and Innovation

Position: Wealth Manager
Location: Reno, NV

We are currently seeking a Wealth Manager who will have responsibility for managing client relationships and formulating and implementing financial planning and investment advice. Additional responsibilities include working with, training, and supervising other Financial Planning team members in delivering client services.

Duties & Responsibilities

- **Client Relationship Management:**
    - Provide objective, unbiased financial planning and investment advice to high-net-worth clients and small businesses by establishing goals and the plan for achieving those goals. Activities include, but are not limited to, developing and coordinating optimal investment, estate, tax, and financial planning strategies.
    - Work with other SFG team members to assist clients in implementing plans.
    - Advise clients in all aspects of their Four Capitals (Financial, Physical, Psychological, and Intellectual).
    - Deliver the SFG Client Experience to the firm's clients.
    - Develop and manage client relationships, including ongoing and regular meetings and communications.
    - Work with Financial Planning Associate(s) to create and review all presentation materials in preparation for client meetings.
    - Assist with client portfolio management, including defining risk and return objectives, selecting appropriate strategies, identifying special requirements, and coordinating portfolio changes and reviews.
    - Provide ongoing client service, including updating plans, reviewing portfolios, discussing returns, and identifying new opportunities.
    - Coordinate financial planning and wealth management strategies with clients' other advisors, including attorneys and CPAs.
    - Deepen and retain existing client relationships; obtain client referrals.

- **Advisory Team Support:**
    - Delegate, coordinate, and follow up on planning and administrative tasks.
    - Serve as a back-up to other Wealth Managers, as needed.
    - Provide ongoing training and mentoring to other Financial Planning team members.
    - Uphold the firm's purpose, vision, and values; incorporate the SFG Core Beliefs of Client Commitment, Innovation, and Service Heart into every aspect of our business and client relationships.

Qualifications

- Strong and relevant academic credentials: bachelor's degree in finance, economics, or related discipline (required); Advanced degrees (MBA, MS) preferred.
- CFP designation (required); additional designations preferred include CFA, CPWA, CPA.
- 10+ years of experience in the financial services industry and 5+ years of experience as a financial advisor/planner providing advice to clients (preferably with an independent registered investment advisory firm).
- Proficiency in Microsoft Office, especially Excel and PowerPoint; experience with financial planning, CRM, portfolio management, and document management software (required); previous experience with ExecPlan, Junxure, and PortfolioCenter (preferred).

Other Skills & Experience

- Deep understanding of the registered investment advisory model.
- Solid understanding of the financial markets and portfolio management, along with the ability to learn the firm's investment process and strategies.
- Demonstrated ability to develop and manage plans and relationships for high-net-worth and ultra-high-net-worth clients.
- Experience with tax and estate issues; ability to identify these issues in the financial planning process and coordinate solutions with clients' other advisors.
- Solid strategic thinker, creative problem solver, and competent decision maker.
- Demonstrated ability to drive bottom line results and productivity.
- Previous experience supervising and developing financial planning/advisory staff.
- Passion to help new and existing clients.
- Continuously exhibits personal integrity and professional initiative.
- Reliable; follows through on commitments; does not shrink from challenges.
- Highly organized and detail-oriented; able to reprioritize tasks.
- Strong commitment to accuracy and delivering high-quality work.
- Excellent written and verbal communication skills.
- Collaborative and able to work effectively with others.
- Flexible team player who is highly adaptable to change and open to new ideas.
- Demonstrated ability to work successfully in an entrepreneurial, small company environment.