SCHULTZ
FINANCIAL GROUP®

A Legacy of Trust & Innovation Since 1982

Wealth Manager

Location: Remote (Must be located in Northern Nevada or Southern California)

Schultz Financial Group Inc. (SFG) is an independent, fee-only wealth management firm based in Reno, Nevada. We offer family office and wealth management services to clients in Nevada, California, and other states. Our team strives to help our clients build their wealth across four capitals: Financial Matters, Physical Well-being, Psychological Space, and Intellectual Engagement. Unlike many financial advisory firms, we do not use model portfolios and we specialize in private investment opportunities for our accredited and qualified purchaser clients. For more information about SFG, please visit our website.

Position Overview: We are currently seeking a Wealth Manager who will be responsible for developing and maintaining client portfolios, managing client relationships, and providing financial planning and investment advice.

Duties & Responsibilities

- **Client Relationship Management:**
    - Provide objective, unbiased investment and financial planning advice to accredited and qualified purchaser 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, retirement, risk management, and financial planning strategies.
    - Develop and manage client portfolios, including defining risk and return objectives, selecting appropriate strategies from a pre-approved list of investment managers, identifying special requirements, and coordinating portfolio changes and reviews.
    - Develop and manage client relationships, including ongoing and regular meetings and communications (in-person, phone, video, email).
    - Create and review all presentation materials in preparation for client meetings.
    - Provide ongoing client service, including updating financial plans, reviewing and discussing portfolios and ongoing investment recommendations, assisting clients with changing circumstances, and identifying new opportunities.
    - Coordinate financial planning and wealth management strategies with clients' other advisors, including attorneys and CPAs.
    - 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.
    - Deepen and retain existing client relationships; obtain client referrals.

- **Advisory Team Support:**
    - Delegate, coordinate, and follow up on planning and administrative tasks.

- Support other Wealth Managers, as needed.
- 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 CPWA, CAIA, and CPA.
- 10+ years of experience in the financial services industry and 3+ years of experience working as a wealth manager at an independent registered investment advisory firm with accredited and qualified purchaser clients.
- Proficiency in Microsoft Office, especially Excel and Word; experience with financial planning, CRM, portfolio management, and document management software (required); previous experience with NaviPlan, Holistiplan, Salesforce, Addepar, and Box.com (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 accredited and qualified purchaser clients, unique to each client's needs and situation.
- Experience with tax and estate issues; ability to identify these issues in the financial planning process and coordinate solutions with clients' other advisors.
- Demonstrates excellent communication skills, both in written and verbal form. Has the ability to explain complex financial strategies to clients in an easy-to-understand way.
- Solid strategic thinker, creative problem solver, and competent decision maker.
- Demonstrated ability to drive bottom line results and productivity.
- Previous experience supervising financial planning/advisory staff.
- Passion to identify solutions and help new and existing clients decide on solutions so that they can lead a fulfilling life.
- 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 a remote, entrepreneurial, small company environment.

To apply for this position, please forward your resume to info@sfginc.com.