SCHULTZ FINANCIAL GROUP℠

A Legacy of Trust & Innovation Since 1982

Associate Wealth Manager

Location: Reno, NV; (Remote is a potential option if located close to Reno)

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 an Associate Wealth Manager to provide support for the financial and investment planning needs of our clients.

Duties & Responsibilities

- Provide support for the financial and investment planning needs of clients including:
    - Conduct research as needed to obtain all necessary data for financial planning analyses.
    - Create financial plans which include projections and analyses across wealth management areas such as tax, estate, investment, retirement, risk management, cash flow, etc.
    - Conduct special request analyses as needed.
    - 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 financial plans, reviewing and discussing portfolios and ongoing investment recommendations, assisting clients with changing circumstances, and identifying new opportunities.
- Work with clients' other advisors, including attorneys and CPAs, to obtain information necessary to complete analyses.
- Create presentation materials in preparation for client meetings.
- Work with other SFG team members to ensure meetings are prepared for and tasks are executed in a timely manner.
- Attend client meetings as requested; take meeting notes and enter notes and follow-up actions in CRM.
- Deliver the SFG Client Experience to the firm's clients.
- 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 preferred designations include CAIA, CPWA or CPA; willingness to obtain CPWA (required).
- 3+ years of experience in the financial services industry and 1+ years of experience working as an Associate Advisor/Planner at an independent registered investment advisory firm.
- Proficiency in Microsoft Office, especially Excel and Word; experience with financial planning, CRM, portfolio management, and document management software (required); previous experience with NaviPlan, Salesforce, Addepar, and Box.com (preferred).

Other Skills & Experience

- 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.
- Deep understanding of the independent 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, 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.
- Solid strategic thinker, creative problem solver, and competent decision maker.
- Demonstrated ability to drive bottom line results and productivity.
- 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.
- 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.