Values. Wealth. Sustainability.

Veris Wealth Partners
Wealth Manager
San Francisco

Company Summary

Veris Wealth Partners is a leading impact wealth management firm. Founded in 2007, Veris serves individuals, families and foundations seeking market performance and social gain by aligning their wealth with their values. Veris delivers comprehensive wealth management, including investment management, trust and philanthropic strategies, with an emphasis on impact and sustainable investing.

Veris is a proud Best for the World® Overall Honoree (2018, 2017, 2016, 2015, 2014, 2013).

Veris has offices in New York City, San Francisco, Portsmouth, NH, and Boulder, CO. For more information, please visit our website: www.veriswp.com.

Position Summary

We are looking for a Wealth Manager based in our SF office.

The Wealth Manager's primary responsibility is to support Senior Wealth Managers in the management of significant client relationships and execution of impact wealth management services in line with the best practices established by Veris Wealth Partners by providing financial planning and prospective client proposal support. The Wealth Manager's secondary responsibility is to take over lead management of legacy investment advisory client relationships as assigned. Client assignments will be made over time based upon experience and demonstrated capacity.

The ideal candidate will have strong client service and analytical skills, understanding of current economic and market perspective, as well as an authentic passion for sustainability issues and helping clients have an impact with their wealth. They will have the experience and aptitude to help clients in all stages of wealth management and life stages to articulate their impact and financial goals, and to construct and implement portfolios to meet those goals in a way that aligns with their values.

The position will require the wealth manager to oversee client service associates and may include direct supervision of client service associates.

Core Duties and Responsibilities

Wealth Management

- ✓ Work with Senior Wealth Managers (SWM) to develop and manage client wealth management plans
- ✓ Maintain familiarity with clients' financial and impact goals
- ✓ Keep current on impact investing landscape and Veris approved strategies
- ✓ Present updates on managers/funds in client meetings
- ✓ Monitor ongoing transaction activity and performance of client accounts
- ✓ Develop appropriate portfolio allocation proposals to meet clients' financial and impact investing objectives
- ✓ Rebalance and recommend portfolio changes in client portfolios as needed
- ✓ Execute trades and implement portfolio changes
- ✓ Update custom client performance reports
- ✓ Update asset allocation spreadsheets
- ✓ Update portfolio benchmarks

Client Service

- ✓ Respond to client inquiries and support SWM in oversight of all client service needs.
- ✓ Coordinate with clients' tax, estate, and other advisors
- ✓ Proactively prepare, schedule, and attend periodic portfolio review meetings
- ✓ Document client meeting discussions, decisions, and follow-ups
- ✓ Respond to client requests: information, reports, wires, checks, journals, etc.
- ✓ Gather and send tax-related documents to clients and accountants
- ✓ Distribute client quarterly reports, newsletters and other communications
- ✓ Client account, record, and performance administration
- ✓ Conduct client-specific projects as necessary

Financial Planning

- ✓ Develop financial plans for clients

New Client Acquisition

- ✓ Identifying and cultivating prospects, including at industry events
- ✓ Support the SWMs in transitioning prospects to clients
- ✓ Create customized proposals for prospective clients

Supervision

- ✓ Oversee and review quality and completion of work of client service associates
- ✓ Supervise, manage and develop client service associate direct reports

Other

- ✓ Expand wealth management knowledge through ongoing education
- ✓ Expand financial planning knowledge through ongoing education
- ✓ Expand impact investing knowledge through ongoing education
- ✓ Participate in the Veris Investment Working Group

- ✓ Follow all firm compliance procedures

Education/Experience/Skills

- ✓ Bachelor’s Degree in business or related field preferred
- ✓ CFP, CIMA, CFA, or progress towards a certification preferred
- ✓ Minimum of 3 years’ experience in financial services
- ✓ Prior experience as a support advisor preferred
- ✓ Prior experience supporting large, complex family and/or institutional relationships preferred
- ✓ Knowledge and experience with impact investing products and solutions preferred
- ✓ Knowledge and experience with financial planning, cashflow planning, trusts, intergenerational wealth planning, and retirement planning preferred
- ✓ Knowledge and experience with portfolio construction, IPS development, asset allocation, manager selection, and monitoring preferred
- ✓ Demonstrated commitment to impact investing and/or the advancement of environmental and social sustainable practices
- ✓ Demonstrated aptitude for qualitative and quantitative analysis
- ✓ Experience leading, mentoring and developing others preferred
- ✓ Experience supporting the sourcing and closing of new business preferred
- ✓ Strong oral and written communication skills
- ✓ Strong attention to detail and total quality focus
- ✓ Excellent organization skills
- ✓ Advanced skills in Microsoft Office, Word and Excel preferred
- ✓ Experience with Fidelity Wealthscape, Schwab Institutional, Envestnet, and Salesforce preferred
- ✓ Exceptional interpersonal skills
- ✓ Passion for achievement
- ✓ Entrepreneurial spirit
- ✓ Life-long learner

Compensation and Benefits

Compensation will be determined by a number of factors including educational background and experience. Veris Wealth Partners has a generous benefits package including health, disability and life insurance, and the opportunity to participate in the firm’s 401k retirement plan.

Application Instructions

To apply, please submit your resume and a cover letter outlining your specific interest in this opportunity to David@newlevelresources.com with *SF Veris / Wealth Manager* and your name written in the subject line. Resumes will be reviewed as received.