New York
San Francisco
Portsmouth

www.veriswp.com

Wealth Manager
San Francisco, California

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 B Corp and Best for the World® Overall Honoree (2019, 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

The Wealth Manager's (WM) primary responsibility is to support Senior Wealth Managers (SWM) in the management of client relationships and execution of impact wealth management services in line with the best practices established by Veris Wealth Partners including providing financial planning and prospective client proposal support.

The ideal candidate will have client service and analytical skills, understanding of current economic and market perspective, as well as an authentic passion for sustainability and justice 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 support the construction and implementation of portfolios to meet those goals in a way that aligns with their values.

The WM may also support or join Veris Committees, firmwide initiatives and have other related responsibilities as may be needed.

Essential Functions

- Maintain familiarity with clients' financial and impact goals and work with SWM to develop and manage client wealth management plans
- Respond to client inquiries and support SWM in oversight of all client service needs
- Coordinate with clients' tax, estate, and other advisors in support of SWM
- Monitor ongoing transaction activity and performance of client accounts and present updates on managers/funds in client meetings
- Proactively prepare, schedule, and attend periodic portfolio review meetings and document client

New York
San Francisco
Portsmouth

www.veriswp.com

meeting discussions, decisions, and follow-ups
- Develop financial plans for clients and prospects and develop asset allocation proposals to meet clients' financial and impact investing objectives; rebalance, recommend, execute trades and implement portfolio changes

Supervisory Responsibilities

- May have Indirect Reports and/or Dotted-Line Reports
  - Client Service Associate

Knowledge, Skills, Abilities

- Excellent organizational, interpersonal, detail oriented, oral and written skills
- Advanced skills in Microsoft Office, Word and Excel
- Usage knowledge of Fidelity Wealthscape, Schwab Institutional, Envestnet, and Salesforce is a plus
- Preference for knowledge and experience with impact investing products and solutions, financial planning, cashflow planning, trusts, intergenerational wealth planning, retirement planning, portfolio construction, IPS development and asset allocation
- Passion and commitment to impact investing and/or the advancement of environmental sustainability and social justice practices
- Demonstrated aptitude for qualitative and quantitative analysis
- An interest in investor psychology

Education and Experience

- Prefer 3 years in investment management industry with an interest or experience in sustainable, responsible and impact investing
- Bachelor's degree preferred
- Progress towards or interest in an advanced degree or professional certification (CFP®, CIMA®, or CFA®)
- Experience monitoring and mentoring the work of associates is a plus

Physical and Mental Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. The firm will provide reasonable accommodation as needed.

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Veris Wealth Partners is proud to be an equal opportunity employer.
We celebrate diversity and are committed to creating an inclusive environment for all employees

- While performing the duties of this position, the employee is regularly required to sit, talk, hear, observe, type, see, use hands to finger, handle, or feel; bend or stoop; reach with hands and arms. Limited walking
- Work infrequently requires limited walking.

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 Margie@newlevelresources.com with *SF Veris / Wealth Manager* and your name written in the subject line. Resumes will be reviewed as received.