Title/Position Available: Associate Wealth Manager
Location: Seattle, WA

Description:

We are seeking a wealth management service advisor to execute our GEMS Wealth Management process for new and existing clients. This advisor would be partnered with a senior advisor and would be primarily focused on working with current clients of the firm to deliver a world class wealth management experience.

Duties include, but are not limited to:

- Working with a senior wealth manager to provide service in the following areas: Investment Management, Wealth Transfer (Estate Planning), Wealth Enhancement (Tax Planning), Wealth Protection (Insurance Planning), and Charitable Giving.
- Conducting regular progress meetings with clients to review the key areas of wealth management.
- Interfacing with the client service associate and the portfolio management team to properly address ongoing client needs.
- Performing research and maintaining proficiency in all aspects of wealth management.
- Interfacing with other partners on the client's wealth management team, such as estate planning attorneys and tax advisors.
- Assisting clients and advisors with other ancillary projects that may be related to our wealth management efforts.

Requirements:
- Bachelor's Degree.
- Minimum of 5 years of professional experience, wealth management experience preferred.
- Series 65 licensed. (This can be accomplished while working at Garde)
- Strong verbal and written communication skills.
- Professional demeanor.

- High degree of confidentiality.
- Great attention to detail.
- Skilled in the use of Microsoft Office applications, including Excel, Outlook, and Word.
- Self-motivated and team oriented.

Preferred Qualifications:

- Customer service focus. Successful candidate must have good personal skills. They must be willing to put in extra effort to provide levels of service beyond client expectations. They have a passion for finding new ways to improve the client experience.
- Basic knowledge of financial markets and/or securities related experience.
- Desire to continually broaden experience through education opportunities and certifications such as the Certified Financial Planner (CFP®) designation.
- Experience working in wealth management and familiarity with a brokerage environment.
- Technology savvy – Possess the skills and knowledge to work with existing technology systems while also having the ability to research and evaluate potential alternative technology solutions.
- Ability to problem solve. Our company prides itself on finding new ways to help our clients achieve their goals and provide best in class customer service. Ability to identify inefficiencies or potential problems while developing new processes to meet our client's objectives.
- Familiar with Zoom, Teams, and other virtual meeting platforms. *Note: We are hiring for an in-office position, but due to the present environment, applicant must be comfortable working virtually as conditions require.*

Compensation:
Competitive salary based on experience and opportunity for annual bonuses.
Employee healthcare paid by company at 75%.
Generous 401(k) plan with matching and discretionary profit sharing contributions upon eligibility.
Paid vacation.

Schedule: M-F: 7am – 4pm

Why work for us?

We are a rapidly growing wealth management firm looking for a team player who can step into an environment of hard work and success. This position offers personal and professional growth potential while affording the right individual an opportunity to contribute to the growth and development of the firm. We offer innovative solutions, while providing the highest level of service to address the myriad wealth management needs of our clients.

To apply, please send a resume and short cover letter to scott.severs@gardecapital.com.