GARDECAPITAL

Title/Position Available: Associate Wealth Manager – JD/CPA/LLM/CFP

Location: Seattle, WA

Description:

We are seeking an Associate Wealth Manager with a JD, CPA, LLM, or Masters in Tax, to execute client service with two senior advisors in the areas of traditional financial planning, estate and trust, tax, and charitable giving.

We ask that the candidate have strong expertise and credentials in either Estate and Trust, or Tax, and be willing to educate themselves in the areas in which they may not be credentialed. An ideal candidate would have both tax and estate and trust expertise. The firm's overall offering in wealth management planning includes cash flow analysis and traditional financial planning, estate and trust integration, tax strategy and implementation, asset protection (e.g. insurance planning), and charitable giving. Our ideal client for the two senior advisors has $10 million or more of investment assets. Many clients have a net worth of $20-50 million or more and have complex planning needs.

We are a Registered Investment Advisor only. We are not registered as a broker dealer, or licensed in insurance.

Duties include, but are not limited to:

- Having extensive knowledge and expertise in all aspects of financial planning, estate planning, and tax planning allowing you to translate that knowledge into the overall wealth management strategies for clients.
- Creating client communication material and thought leadership.
- Educating and Training Advisors:
    - Facilitating the education of Advisors to provide the needed tools and knowledge to lead client relationships.
- Client Service Work
    - Partnering with two Senior Advisors to provide wealth management services directly to clients.

- Conducting progress meetings with clients to execute the key areas of wealth management.
- Interfacing with the client service associates and the portfolio management team to properly address ongoing client needs.
- Interfacing with other partners on the client's wealth management team, such as outside estate planning attorneys and tax advisors.
- Assisting clients and advisors with other ancillary projects that may be related to our wealth management efforts.

Requirements:

- Education should include one or several of the following: undergraduate accounting degree, Masters in Tax or LLM, or a JD with specialization in Estate and Trust.
- Minimum of 5 years of professional experience in wealth management, practicing estate and trust law, or tax work for High-Net-Worth investors.
- Successful candidate will likely have a CFP designation.
- Series 65 licensed. (This can be accomplished while working at Garde)
- Strong verbal and written communication skills.
- Confidential integrity.
- Skilled in the use of Microsoft Office applications, including Excel, Outlook, and Word.
- Technical writing skills.
- 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.
- Good knowledge of financial markets and/or securities related experience.
- Self-motivated and team oriented.

Compensation:

Our compensation goal is to provide overall compensation packages in the 90th percentile of the industry, and with that comes performing at the 90th percentile. Our retirement plan corporate contributions are very generous, which highly incentivizes participant engagement, and allows for all colleagues to have exceptional financial careers. We also provide a high-quality health care benefits package for employees.

Regarding lifestyle, we believe that our colleagues should be able to self-motivate, plan their own schedule, and take whatever time off as they see appropriate. We have an unlimited vacation policy under the top decile performance assumption.

Approximate Firm Hours: M-F: 7am – 4pm

Why work for us? We are a high growth firm that has doubled twice in the last 8 years, and we're looking to do that again in the next five years and five years after that. Working on a high-performance team creates meaningful work and meaningful opportunities. A rising tide lifts all boats, and when you're swimming with the tide, everything is better, particularly your career.

Location and In Person:
Initially we expect this person to have 100% in-person office hours. Over time like other colleagues, you may have flexible in-office hours, but we require in person meeting time with clients and colleagues as necessary, and must physically be in the greater Puget Sound area.

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