GARDECAPITAL

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

**Description:**

We are seeking a wealth management service advisor to execute our proprietary 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. Our ideal clients fall into two categories, $5-25 million and over $25 million.

**Duties** include, but are not limited to:

- Working with a senior wealth manager to provide service in the following areas: Investment Management, Cash Flow Planning (Financial Planning), Wealth Transfer (Estate Planning), Wealth Enhancement (Tax Planning), Wealth Protection (Insurance Planning), and Charitable Giving.
- Conduct 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 with other ancillary projects that may be related to overall wealth management.

**Requirements:**
- Bachelor's Degree.
- Minimum of 3 years working in a client facing wealth management capacity at a financial firm.
- 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 MS office 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 client service that is beyond client expectations. They have a passion for finding new ways to improve client experience.
- Working knowledge of financial markets and/or securities related experience.
- *CPA, JD, CFP, CFA or other advanced planning certification.*
- *Experience helping clients in optimizing tax and estate planning goals.*
- Experience providing advice to 401(k) plan participants.
- Technology savvy – Possess the skills and knowledge to work with existing technology systems while also having the ability to research and evaluate potential 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.

**Compensation:**
Competitive salary based on experience and opportunity for annual bonuses.
Healthcare paid by company at 75% for employee.
Generous 401(k) Match after 1 year of service.
Paid vacation.

Depending on experience, starting compensation guidelines are as follows:

- Professional finance experience, but not specific to this role - $100,000 base salary.
- Wealth Manager Experience and CFP Designation – Greater than 3 years - $125,000.
- Wealth Manager Experience and CFP Designation – Greater than 5 years - $150,000.
- CPA with no Wealth Manager Experience - $125,000.
- Wealth Manager Experience and CPA Designation – Greater than 5 years - $150,000.
- Wealth Manager Experience and JD with Focus on Estate and Trust – $175,000.

**Schedule:** M-F: 7am – 4pm, and as needed for meeting client deadlines. The employee will be working in the office on a daily basis during the training period. Once the training is complete, they will have an opportunity to transition to a flexible schedule of up to two days working remotely each week.

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.