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Senior Advisor / Private Wealth Management

The Senior Advisor / Private Wealth Management role is responsible for building productive relationships with affluent clients – defined as clients with greater than 1M+ in investable assets – as well as small institutions, and in soliciting new prospects, bringing in new clients and providing exceptional client service.

Company Location – West Los Angeles, California area (preferred) / West Coast

Company Description – Firm is a medium-sized Registered Investment Advisor (RIA) with just under $800 million in AUM; the firm employs just over 20 individuals. The firm's main business is to manage equity, fixed income and balanced portfolios for clients. The firm also provides financial planning for clients as well as having a network of unaffiliated estate and retirement professionals. The firm has an in-house research team (for both stocks and bonds) as well as being an approved user of Dimensional Fund Advisors (DFA).

Job Type – Full-time / Extensive travel required (60% - 75%)

Essential Duties and Responsibilities

- Business development, bringing new clients by outreach and networking, converting leads to clients, and growing current client assets
- Identifying client needs and ensuring all wealth management needs, including investments, insurance, tax and estate planning, etc., are being addressed
- Maintaining excellent and effective ongoing client relationships
- Create (with assistance from home office) and maintain financial plans for current and prospective clients

Knowledge, Skills and Experience

- Bachelor's degree (business/marketing emphasis) required, Master's degree and/or industry designations preferred
- 5-10 years of relevant business experience – high net worth or advisory/full service business experience
- Deep understanding of various investment products and ability to educate prospects and clients on the values and differences of each

- Strong understanding of financial services & wealth management; knowledge of the 401(k) market is preferred
- Meticulous attention to detail
- Strong consultative selling, communication and organizational skills
- Current book of clients preferred, but not mandatory
- Excellent interpersonal skills and flexibility to adapt to a variety of personalities
- Team player, with strong work ethic and ability to achieve business goals

Compensation

- Competitive Base salary plus bonus based on agreed upon metrics. Compensation commensurate with experience.
- Industry competitive benefits package, including medical and 401(k).

Interested candidates should send their resumes or direct all questions to Andy Klausner at andy@akadvisorypartners.com.