ROBERTSON STEPHENS®

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Robertson Stephens Wealth Management

A Career Path in the Wealth Management Industry

Role: Associate Wealth Manager;
Location: Austin, Texas; Classification: Full Time

Company Overview

Robertson Stephens Wealth Management (RSWM) is a national wealth management firm with offices in San Francisco, New York, Seattle, Boise, Sun Valley, Santa Rosa, Marin County, Menlo Park, Pasadena, Denver, Austin, Houston, and Holmdel. The firm serves the financial planning and investment strategy needs of individuals and family offices. Employees of the firm share a solid work ethic, a drive to innovate within our industry and above all strive for value-creation on behalf of our clients.

Job Description

The primary role of the Associate Wealth Manager is to provide client service and financial management support to our Wealth Manager in Austin, Texas. The ideal candidate will be an integral part of our team, working with other Wealth Managers, Client Service and Operations professionals, and directly with clients to support their financial needs.

You should share our passion for serving clients and community and our belief in the value of collaboration, optimism, communication, and respect for each team member's abilities.

A successful Associate Wealth Manager is a self-starter with a strong sense of ownership and initiative. Working with directly with clients, we will depend on you for the thoughtful, thorough, and accurate preparation of financial planning and portfolio review meeting materials. You will be accountable for careful meeting notes and timely follow-up. You will be responsible for clear and precise communication and respectful collaboration with our Operations and Technology staff on client data and account management needs. You will be expected to work well both independently and as part of the team.

In return, you will have an opportunity to assume increasing responsibility for primary relationships. As you progress, you will benefit from one-on-one mentorship with Wealth Managers who have decades of experience. You will join a team that is supportive and which looks for your full commitment, creativity, and insights.

Responsibilities

- Develop strong client relationships, understanding, and addressing clients' situations, values, and unique needs while providing an exceptional experience
- Communicate with clients on the implementation of their financial plans, illustrating the potential impact of various plan scenarios and updating plans based on key events in their lives
- Develop sound holistic financial plans to grow and protect wealth - including cash flow, investment portfolios, insurance, and estate planning

- Communicate knowledgeably about the investment market and economic conditions
- Prepare for client meetings, including drafting financial and investment plans
- Help with cash management, trading and rebalancing based on client needs and plans
- Take thorough meeting notes and managing follow-up tasks
- Document all client activities, communications, and presentations in files and systems
- Find and approach prospective clients; fostering new business development opportunities to help the firm grow
- Build strong relationships to retain existing clients
- Maintain updated knowledge of regulations, practices and financial products

Personal Qualities

- Team-oriented, respectful, high integrity, humility
- Self-starter, with ability to follow direction and offer perspective on new initiatives
- Detail focused with excellent organization skills and the ability to multi-task
- Comfortable working in a fast-paced and deadline focused environment
- Excellent written, oral and listening communication skills

Skills/Qualifications

- Experience in business development, customer service and operations
- Ability to analyze financial information and comply with regulations
- Holds confidence in hosting conference calls, creating meeting agendas, and articulating meeting minutes with clients and business teams
- Demonstrates a keen risk awareness and knowledge of when and how to escalate potential issues
- Outstanding communication skills, with the ability to foster long term relationships
- Ability to navigate online custodian platforms, such as Schwab and Fidelity
- Proficiency in MS Office, Excel and CRM systems, eMoney a plus
- Series 7 & 66 registered is a plus
- CPA or CFP designation or preparing for the designation is a plus
- BA/BS degree required

Robertson Stephens Wealth Management, LLC is an equal opportunity employer. Diversity and inclusion are essential elements of our culture. We are committed to fostering an environment where individual perspectives, backgrounds, and life experiences make the firm a great place to work, and result in a more satisfying client experience