

**Wealth Manager – McCarthy Wealth Management (Newport Beach, CA)**  
**Full-Time | \$90,000 – \$150,000**

**About the Role**

McCarthy Wealth Management is seeking a highly qualified and experienced **Wealth Manager** to join our team in Newport Beach, CA. This full-time position offers the opportunity to work closely with the firm's founder and team to serve a select clientele of high-net-worth individuals, including business owners and their families. The ideal candidate will be responsible for managing both existing and new client relationships, with a strong focus on comprehensive financial planning, retirement strategies, and estate planning solutions.

**Key Responsibilities**

- Deliver a best-in-class service experience to a sophisticated client base through proactive communication and follow-through
- Serve as a trusted advisor for clients' financial planning, investment management, and wealth strategy needs
- Cultivate new client relationships through networking, referrals, and professional connections
- Represent the firm with professionalism and integrity in all client and industry interactions
- Contribute to internal projects and process improvement initiatives to enhance firm operations

**Qualifications**

- Bachelor's degree required; majors in Finance, Business, or Economics preferred
- Active Series 7 and 66 licenses (or Series 63 and 65)
- Professional designation such as **CFP®** or **CFA** strongly preferred
- Minimum of 5 years of experience in wealth management or financial planning
- Experience working with qualified retirement plans is a plus
- Excellent written and verbal communication skills
- Ability to manage multiple priorities efficiently and meet deadlines
- A collaborative team player with a self-starter attitude and sales-minded approach
- Proficiency in Microsoft Excel, PowerPoint, and Outlook

**Who You Are**

You're an outgoing, motivated professional with a passion for helping clients achieve their financial goals. You thrive in a fast-paced environment and excel at building strong relationships. You are organized, detail-oriented, and eager to contribute to the growth of a client-focused firm.

**To Apply**

Please send your **resume** and **cover letter** to [info@MWMplanners.com](mailto:info@MWMplanners.com).

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**About McCarthy Wealth Management**

McCarthy Wealth Management is an independent wealth advisory firm based in Newport Beach, CA. Affiliated with an independent broker-dealer, we specialize in providing clear, objective financial advice and investment management services to high-net-worth individuals, families, and business owners. Learn more at [www.MWMplanners.com](http://www.MWMplanners.com).