POSITION: Wealth Management Analyst (full-time)
LOCATION: Monterey, CA

Firm Overview:

We are a growing independent, fee only, comprehensive financial planning and investment management firm serving high net worth individuals in the Monterey, CA area. We are a dynamic firm of eight employees with $260 million of assets under management. The firm’s focus is creating a warm and exceptional client experience, providing high caliber financial solutions, and always putting client interests first. The firm’s mission is “Be the firm we would hire for ourselves”

Our employees are as important as our clients, and we work to provide a collaborative, academic, team environment, along with a focus on continuous improvement and knowledge.

Where we’re located:

The Monterey Peninsula is located two hours south of San Francisco, CA and is one of the great tourist destinations of the world. The area is known for its exquisite coastline, sophisticated culture, small town feel, world renowned golf courses, bountiful of fresh produce and award winning wineries. If you like ocean activities, there’s kayaking, sailing, paddle boarding, scuba diving and, of course, surfing. If you prefer land activities, there are miles of miles of great hiking, mountain biking trails and unbelievable golf courses.

We value someone who is

- excited to be part of a dynamic, growing firm in a rapidly changing industry
- eager to learn and to never stop
- motivated to tackle new challenges
- client focused
- focused on delivering an exceptional quality of work
- extremely detail-oriented with outstanding communication skills
- collaborative and able to work well in a team oriented environment

What we seek:

- Bachelor’s degree or equivalent experience
- A basic understanding of financial planning, and a thirst to learn and grow as a financial professional
- Desire to obtain a professional designation such as a CFP or CFA early in your career with us
- Ability to perform at a high level while multi-tasking
- A self-starter, problem solver and a goal-oriented team player
- Uncompromising ethical standards
- An organized approach to tasks with a sense of urgency
What you’ll do:

- Support the advisors in serving existing and potential clients by providing client operations support
- Prepare initial financial planning reports for review
- Propose and implement trades in client portfolios
- Ensure the accuracy and completeness of cash management in client portfolios
- Assist with investment research
- Complete ad-hoc analysis for advisors and clients
- Design, manage and implement projects, with the rest of the team, in pursuit of company goals.

What we offer:

- The start of a challenging career with the potential for a fulfilling future
- A collaborative team that cares deeply about the firm’s culture
- Competitive salary
- Health insurance
- Profit Sharing / Bonus
- Retirement Savings plan with employer match
- 24 days of PTO
- Education Assistance

To Apply:

Please send resume and a cover letter describing your interest in this position and how your background and experience is a match for the role to: apply@integriswealth.com