GOLUB GROUP
BUILDING SUSTAINABLE WEALTH

Financial Advisor (FA)

Join an acclaimed and collegial, 30-person firm on its way to becoming the most admired wealth management firm serving high-net-worth individuals in the Bay Area. Golub Group combines comprehensive financial planning and institutional-grade investment management to secure better futures for our clients.

Position Description

Reports to: Aaron Szager, Advisor Group Manager
Status: Full Time/Exempt
Benefits: Yes
Date: Immediate

Job Summary

Financial Advisors have the responsibility for managing existing client relationships, either with guidance from more experienced Senior Financial Advisors or on their own. The position may be responsible for formulating and implementing advice, but may also rely on Portfolio Managers, Partners and/or more senior financial advisors to develop recommendations.

Duties and Responsibilities

- Builds and deepens relationships by providing a high quality client experience in all interactions
- Obtains and reviews clients' investment goals, time horizons and tolerance for market volatility
- Schedules, prepares, holds and executes on follow up items for all client meetings
- Produces, presents and reviews/updates financial plans designed to help clients achieve their goals
- Writes, reviews and updates Investment Policy Statements
- Serves as a primary liaison between client and portfolio management team
- Earns/asks for introductions to new clients by focusing on relationship and being of uncommon value

Qualifications

- Work experience: a minimum of 3 years providing advisory services in a client facing role
- Bachelor's degree
- CFP Certified
- Highly proficient in MS Office; experience with eMoney and Tamarac/AdvisorView a plus
- Excellent communication, organizational and interpersonal skills (integrity, humility, respect, empathy)
- Ability to work independently but also be a proactive contributing team member
- Strong attention to detail and ability to follow through on projects effectively

Salary and Benefits

- Salary based on experience
- Company profit-sharing plan (eligible after 6 months of employment plus 1 full quarter)
- Quarterly bonus based on successfully completing financial plan metrics
- Incentive compensation on new assets (existing client additional and referrals from clients and COIs)
- Medical, dental, and vision coverage, Flexible Spending Account/Health Savings Account, and 401K plan

The Golub Group, LLC is an Equal Opportunity Employer

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www.golubgroup.com