MERITAS™

Marin Office
100 Larkspur Landing Circle,
Suite 110, Larkspur, CA 94939
t: 415.300.4560 f: 415.524.4842

Sonoma Office
3510 Unocal Place, Suite 325
Santa Rosa, CA 95403
t: 707.508.4600

Meritas 3-Year Resident Associate Program (Start date July 2023)

Explanation and Description

The Meritas Wealth Management LLC Resident Associate (RA) position will be a unique learning experience for the successful candidate—learning financial planning at a planning-centric firm, from a great team. The candidate will work directly with advisors and clients – preparing financial plans and plan updates, and working in all aspects of financial planning, from the discovery process to implementation and ongoing support of Meritas' clients' goals. They will gain the experience necessary to qualify to be a CFP® certificant, become part of the local planning community, and will have the opportunity to prepare for and take the CFP® Exam.

Financial Planning Resident Associate (RA)

Upon successful completion of this 36-month program, the RA will be fully prepared to join an established planning firm or have the confidence and financial planning competence to practice on their own. They will be treated and have the same expectations as other Meritas employees even though the position will end after three years. At that time, the Resident will move on to find other employment and will be highly qualified for attractive opportunities within the financial planning profession. This position, which is salaried (no sales-based compensation), is being offered by Meritas to leverage the firm's financial planning team and to help increase the number of competent planners entering the financial planning profession.

What you will do

- Meeting and working directly with the firm's clients in support of the firm's Advisors.
- Taking meeting notes, entering related tasks into Advisor Engine (formerly Junxure), gathering information, and implementing recommendations.
- Documenting progress of client service actions and communications in Advisor Engine.
- Communicating with clients.
- Preparing and implementing financial plans and updates.
- Implementing the firm's investment management services.
- Completing financial planning and investment management research and projects.
- Designing, implementing, and managing projects with the rest of the team.
- Completing client service and administrative tasks such as paperwork, moving money, account openings/closings/transfers, phones, scanning, filing, etc.
- Engaged participation at the firm's quarterly staff meetings and retreats.

What you need/Requirements

Applicants must:

- Be trustworthy, ethical, hard-working, and professional.
- By July 2023, hold a bachelor's degree and complete a CFP Board Registered Program.

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Requirements (Continued)

Applicants must:

- Demonstrate excellent written, verbal, and technical skills.
- Be detail-oriented and able to manage tasks and projects to their successful completion.
- Enjoy working as part of a team and able to work effectively and efficiently on their own.
- Desire to learn and grown.
- Be enthusiastic to participate in the financial planning profession and community.

Compensation/Benefits/Perks

- Competitive salary
- 401(k) with company match
- Full array of benefits (medical, short and long-term disability, life, wellness, etc.)
- CFP® Exam registration and preparation costs (if applicable)
- Start with 4 weeks PTO
- FPA membership
- Hybrid work option after 6 months

How to Apply - Deadline: November 4, 2022

- Email to HR@meritaswealth.com. *No phone calls please*.
- Please send your resume, cover letter and short essays answering the below questions.

Short-Essay Questions

1. Why do you want to work for Meritas Wealth Management?
2. What would you bring to Meritas that is unique and special?
3. What would you need from Meritas to reach your highest potential?

Refer to the timeline below for more information on the hiring process and for your planning purposes. Please *note* that not every step of the interview process is guaranteed to all applicants.

Typical Steps in the Hiring Process

1. **Initial phone interview with Kacy Gott -** Kolbe Index A due prior to call (we will provide you with a coupon code to complete).
2. **Interim Assignment – Round 1 -** Listen to a discovery meetings, take notes, and send to us 48 hours prior to video interview. We will provide the link.
3. **Virtual Interview Round 1 –** with financial planning team members
4. **Interim Assignment – Round 2 -** Review client meeting notes, write follow-up email to client, send to us 48 hours after it is provided to you.
5. **Interview Round 2 (Virtual or in-person) –** with additional team members
6. **Interview Round 3 (Virtual or in-person) –** with partners
7. **Decision**