The Cascade Group is looking for an inspired, client-focused Associate Director of Advanced Planning Implementation to strengthen our team of top-performers. In this role, you will develop deep relationships with our top ultra-high-net worth families and lead the execution of advanced wealth planning solutions tailored specifically for each client (full description below).

Our team

The Cascade Group is a boutique practice within UBS' Private Wealth Management Division, which represents the top 5% of UBS advisor teams. We act as an outsourced family office for successful business owners and executives that have experienced a life-changing liquidity event (in excess of $10 million).

Our team currently serves 45 families, who entrust us with over $1 billion in managed assets. We are passionately committed to sustained and consistent business growth, while maintaining our vivid culture and industry-leading advice and client service.

Our website: http://www.ubs.com/team/cascade

What you will be a part of

By 2019, we expect to achieve the following:

- $1.65 billion in assets under management
- 75 client families or less
- 13 top-performing, highly-credentialed private wealth management professionals (currently 10)
- Continue to be recognized throughout the professional community as the premier team for liquidity-event planning and management
- Be known throughout the Pacific Northwest wealth management industry as the best place to work
- Give back to the greater-Seattle community through semi-annual charitable team activities

What we offer

- Recognition for top-performers
- Energetic team culture
- Aggressive salary and bonus structure
- Perks such as block vacation incentives and paid parking

Role & Responsibilities - Associate Director of Advanced Planning Implementation

Posting: http://ubs.jobs/bellevue-wa/senior-wealth-strategy associate/45A9370D811C40F6B28E06E393869B0D/job/

As part of your role, you will help clients identify potential gaps and uncover wealth management opportunities in the areas of: investment management, wealth enhancement, wealth transfer, wealth protection, and charitable giving. This position is directly client-facing and focused on helping each client family make progress toward their unique set of financial objectives which may include: business succession, tax mitigation, liability management, and philanthropy.

Responsibilities:

- Develop and maintain informed client relationships spanning investment analysis, financial planning, tax concerns, charitable and estate planning, and ancillary services
- Identification and documentation of client's unique goals and objectives

- Conduct frequent calls and meetings to get client updates, adjust financial objectives, monitor progress toward goals, and evaluate new opportunities
- Make recommendations for wealth management solutions based on clients' needs
- Coordinate and review wealth maximization strategies with clients, their CPAs, and attorneys

Experience:

- Demonstrated experience working with ultra-high net worth clients ($10 million+ net worth)
- Minimum 5 years in a financial planning or wealth management role with demonstrated ability to manage client relationships
- CFP, ChFC, CLU or other industry designation required
- Series 7, 66, insurance license must be obtained within 120 days of hire, if not already licensed
- Bachelor’s Degree or higher required
- Familiarity with personal financial planning software required. Naviplan or Money Guide Pro is a plus.

Skills:

- Outstanding communication, listening, and relationship building skills
- Proactive, self-motivated approach
- Excellent follow-up skills and attention to detail
- Advanced knowledge of various financial topic areas (income taxation, estate tax & gifting, philanthropic giving, education funding, liability management, investments, etc.)
- Understanding of basic and advanced estate planning concepts in order to coordinate with clients' tax and legal advisors
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook.
- Ability to work with a high degree of autonomy, set priorities and manage deadlines
- Team-player, enthusiastic, positive, polished, poised and professional
- Maintains the utmost discretion in working with sensitive and confidential information