Wealth Advisor – Seattle/Bellevue, WA - Position Profile

FIRM OVERVIEW

Bordeaux Wealth Advisors is a premier investment advisory and wealth management firm with approximately $4 billion in assets under management across 170 families. We have offices in Menlo Park, California, and Seattle, Washington -- areas that are synonymous with innovation, entrepreneurship and wealth creation.

We act as personal CFOs for high-net-worth individuals and families in growing, preserving and transferring wealth. BWA is proud to be a member of Focus Financial Partners -- a partnership of approximately 60 elite wealth management firms, predominantly in the U.S.

Our mission is to serve as our client's most trusted advisor -- guiding them to achieve their financial goals and objectives -- and enabling them to achieve their ideal future. We take a holistic approach toward one's entire financial situation and deliver guidance on investment portfolio construction, income tax and cash flow planning, estate and wealth transfer, insurance and risk management, education and retirement planning, as well as philanthropic gifting.

BWA's culture is centered on a relentless pursuit of excellence, integrity, honesty, intellectual rigor and curiosity, with a strong client service ethos. We are a proudly independent firm and believe deeply in putting our clients' interests first.

POSITION SUMMARY

The Wealth Advisor is responsible for delivering exceptional advice and service to clients of BWA. You will achieve this by being the first call for any financial guidance and service that our clients need. You will be the primary point of contact for a select group of clients as well as be the supporting advisor for others. You will work expeditiously, along with others on the team, to conduct financial analyses, construct and manage investment portfolios, project income tax liabilities, provide guidance on estate planning, and address other financial needs that will benefit our clients.

You will customize the service level for every client and deliver exceptional work quality in all that you do. Your guidance will be backed by data and sound historical experience. As the face of BWA, you will strive to build a level of trust and respect with clients that can span across generations.

The ideal candidate will have 10^{+} years of experience in wealth management or a related field and have a strong desire to work in a team-oriented atmosphere.

ESSENTIAL DUTIES AND RESPONSIBILITIES

You are ultimately responsible for the success of the clients with whom you work, and their satisfaction will be measured in the assets they entrust with the firm to manage, the level of referrals they provide, and the retention rate of BWA clients.

The following duties are generally representative of the nature and level of work expected, and are not necessarily all-inclusive:

- Be the point person responsible for managing the guidance and service provided to firm clients – either as a supporting advisor or the lead advisor on client engagements.
- Prepare and/or review agendas, reports, and analyses for client meetings and then lead those meetings.
- Evaluate various financial decisions and strategies for clients by conducting research and complex financial analyses on a wide range of investment, tax, estate and financial planning topics.
- Develop, recommend and assist in the implementation of complex portfolio asset allocation and investment strategies -- which will include the use of various alternative investment strategies such as hedge funds, private equity and direct real estate.
- Contribute to the growth in new BWA clients via new business efforts, including referrals, external networking, as well as active participation in firm-sponsored growth events and activities.
- Collaborate with the broader BWA client service team to help provide the support needed to deliver high-quality service to our clients -- whether it is operational support (such as billing), analysis (such as financial modeling and tax projections) or client service needs (such as responding to inquiries, moving money, etc.).
- Provide guidance, feedback and mentoring to junior team members to continue to build their acumen, technical knowledge and advisory abilities.
- Perform general research in areas of investments, income tax planning, estate planning, the impact of tax or legal regulations, and financial markets to expand your knowledge base as well as to contribute to the firm's educational growth.
- Lead various projects and responsibilities that help manage and grow the firm. These are non-client-focused responsibilities that enable us to have a successful and scalable practice.
- Participate in various BWA Committees.
- Understand that safety and risk management are a priority by adhering to all firm compliance policies and procedures and correctly follow client service requirements to help minimize errors or mistakes.

REQUIREMENTS – EXPERIENCE, EDUCATION, COMPETENCIES & PROFESSIONAL SKILLS

- Bachelor's degree in finance/accounting/economics from a premier University with strong academic achievement -- MBA is preferred
- 10+ years of wealth management related experience

- CFP®, CPA or CFA® designation preferred or working towards achieving one
- Local candidates or extensive experience in the Seattle market preferred
- Strong PC skills with proficiency in Excel and a well-developed quantitative aptitude to develop models to analyze financial matters
- Motivated to serve others -- strong relationship-building skills
- Passion for excellence -- strong attention to detail and accuracy
- Analytical thinking and problem-solving skills
- Ability to work independently and within strict deadlines while managing multiple priorities and open projects
- Strong interpersonal, verbal, and written communication skills
- Impeccable integrity and honesty – follows up and keeps promises
- Strong professional and personal references
- Successfully pass background checks

COMPENSATION

An attractive compensation package will be offered commensurate with experience and ability. This package will include a competitive base salary, an incentive bonus, a new business bonus, health, dental, vision, life and disability insurance benefits, a 401(k) plan and paid time off.

If interested, please submit resume to Jon Snare at: JSnare@BordeauxAdvisors.com

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