Destination Wealth Management is a rapidly growing Wealth Management firm with an opening for a Relationship Advisor. This is an opportunity for an intelligent, positive, and responsible person with high initiative, strong communication skills, and a desire to learn.

The Relationship Advisor position primarily focuses on maintaining and adding value to existing client relationships, as well as interacting with other professionals in a team-based structure.

This is an ideal position for someone who enjoys working in a team environment with a wide range of clients and has the experience and knowledge to make each relationship valuable.

Job Responsibilities:

- Partner with Senior Advisors to develop and implement customized wealth planning strategies for clients;
- Manage multiple levels of client relationships within a team environment;
- Convey the firm's investment philosophy and strategy;
- Perform regular Portfolio Review meetings with clients to discuss their strategy;
- Address and research financial planning questions (e.g. Tax issues, cost basis, estate planning, insurance, stock options);
- Develop financial planning reports (e.g. Retirement projections, income analysis, education funding);
- Contribute to expanding client relationships;
- Strengthen client relationships for asset retention and aggregation;
- Contribute to the team and to meeting company growth goals; and
- Adherence to Destination Wealth Management Advisors' code of ethics and standards, and compliance requirements.

Candidate Characteristics:

- Accepts personal ownership for commitments and goals;
- Effectively communicates, expresses ideas clearly, persuasively, and effectively;
- Exemplary relationship skills;
- Professional conduct with peers;
- Enthusiasm to provide world-class service to our clients;
- Ability to organize and prioritize in a timely manner;
- Attention to detail and reliability;
- Willingness to expand knowledge and expertise; and
- Position is currently hybrid remote but does require some willingness to periodically see clients face-to-face throughout the Bay Area and the Central Valley.

Education/Experience Requirements:

- College Degree;
- Requires 7+ years as a Registered Investment Advisor representative. Alternatively, will consider at least 18 months as a Registered Investment Advisor representative and 5+ years of Investment and Financial Planning experience;
- CFP Designation preferred; however, will consider candidates who have passed the CFP exam and are in the process of completing the CFP experience requirement; and
- Must have valid driver's license.

Qualified Candidates:

Please send cover letter and resume to jobs@destinationwm.com