Are you a blossoming wealth advisor who feels they cannot do their best work at the firm you are currently with? Does your current employer not have the same client-first approach and professional standards you do? Do you wonder if there might be a better fit, or a model, out there for you?

ZRC Wealth Management, LLC could be that place! We are a fee-only, independent Registered Investment Advisor and wealth management firm with offices in Santa Rosa, Walnut Creek, and Napa. We have amazing clients that we strive each day to do our very best work for and we are growing!

If you have been looking for a place where you can focus on building meaningful client relationships as part of a hard-working, highly collaborative team, we currently have an opening for a Wealth Advisor based in our Santa Rosa, California office.

Wealth Advisor – based in our Santa Rosa, California office.

We are seeking to add a new Wealth Advisor to our team, someone who is interested in building a long-term career. This person will be the lead advisor on a number of new and existing relationships. Our ideal candidate thrives on being a trusted advisor, is passionate about helping others, has an entrepreneurial spirit and believes strongly in providing exceptional client service. Someone with excellent verbal and written communication skills and a positive, can-do attitude. We believe in offering a rewarding and personally fulfilling career path with a work-life balance.

Duties and Responsibilities

A Wealth Advisor performs on the following key areas:

- Is the primary point of contact with clients, speaking and meeting with them, developing and delivering comprehensive financial plans.
- Engages with clients to understand their life experience, their current situation, their aspirations, goals and develop strategies to help them achieve their desired personal and financial goals.
- Analyzes prospective clients' investment portfolios and financial plans.
- Manages client communications and follow-up with clients' other professional advisors.
- Provides client meeting support – schedules meetings, prepares materials and follows-up with clients after meetings.
- Manages client information – prepare client reports, submit and follow up on necessary paperwork, regularly update CRM.
- Develops, maintains, and improve systems for monitoring workflows.
- Contributes and/or lead firm initiatives around business development, client events, client communications, service model and technology.
- Involved in the financial planning profession, local FPA chapter, and attend conferences to ensure the firm is at the forefront of the profession.

Qualifications

The Wealth Advisor position typically requires the following qualifications:

- 5+ years financial services industry experience and four year college degree.
- Personable, warm, engaging, empathetic, poised, and diplomatic.

- Ideal candidate will be a Certified Financial Planner™ professional or be enrolled in a CFP program and working towards their CFP designation.
- Minimum two years' experience as a "first chair" or lead advisor.
- Minimum two years' experience developing financial plans (preferably utilizing a leading financial planning software such as MoneyGuidePro or eMoney) and presenting them to clients.
- Excellent written and verbal communication skills.
- Problem-solving, solutions-oriented approach.
- Must be organized, meticulous, detail-oriented and able to multitask.
- Team player, able to interact well with clients and all levels of the firm.
- Desire/ability to work successfully in a small company environment.
- Highly technology savvy with proficiency in Word, Excel, PowerPoint, email, CRM, and other programs.
- Professional appearance and etiquette.
- Experience with broker/ dealer custody operations (such as Schwab Advisor Services, Fidelity Institutional, TD Ameritrade Institutional, or Pershing) a major plus.
- Experience with rebalancing software such as Tamarac, iRebal, or Morningstar TRX a plus.
- Experience with the Tamarac Reporting system a plus.
- Knowledge of investments and financial markets.
- Existing clients not required, but a major plus.

Salary and Benefits

ZRC Wealth Management seeks exceptional employees. Therefore, it is the philosophy of the company to employ a compensation plan to reward exceptional performance.

- Compensation consists of a base salary plus generous individual performance bonuses and company performance bonus. Compensation commensurate with skills, experience, and if clients are brought over.
- Generous benefits include four weeks of vacation your first year, health insurance, and participation in our 401(k) plan.
- Financial support for professional accreditation/continuing education requirements and other education/training opportunities.
- Opportunity to take-on additional responsibilities and grow professionally as the firm grows.
- Full time position with the possibility of a flexible schedule that could involve telecommuting.
- Candidates will be required to provide professional references and undergo a background check.
- ZRC appreciates the value of a balanced life.

Applications

Qualified applicants should submit a **cover letter and their resume** to ZRC Wealth Management at invest@zrcwm.com .

ZRC Wealth Management is an Equal Opportunity Employer

Firm Overview

Founded in 1999, ZRC Wealth Management, LLC is a Northern California based Registered Investment Advisor that provides investment management and financial planning services to discerning individuals, families, and companies across the United States. As an independent and privately held firm – ZRC specializes in helping investors grow, manage, and protect their wealth. As a Fiduciary, ZRC is dedicated to putting our clients' best interest first.

ZRC is fee-only – meaning we are solely compensated by our clients – reducing conflicts of interest and aligning their goals with ours. With offices in Santa Rosa, Walnut Creek, and St. Helena, we serve more than 150 clients throughout Northern California and across the globe. These clients entrust us with nearly $200 million of assets to manage. We manage investment portfolios based on Nobel-prize-winning academic research, and primarily structure our portfolios with factor-based mutual funds (such as those pioneered by Dimensional Fund Advisors, given their lower costs and long-term expected performance) and ETFs.

The value of ZRC's services are;

- Independent, expert financial advice.
- World class service.
- Empathy and client-first mentality.
- Exceptional results.

ZRC Wealth Management is an Equal Opportunity Employer