VIGILANT Capital Management, LLC

JOB POSTING: Associate Wealth Advisor

DATE: February 2021

Vigilant Capital Management, a growing wealth management firm with approximately $1.8 billion under management, is looking for an Associate Wealth Advisor to join its dynamic and talented team. This role works closely with the senior Wealth Advisor, and co-Founder, to deliver the Firm's wealth planning value proposition to clients who are high net worth and ultra-high net worth individuals and families. We are looking for a detail- and numbers-orientated individual with a CPA and/or solid tax planning experience. The role does not involve the preparation of tax returns. This position will involve creating wealth planning presentations, interacting regularly with clients and other advisors, as well as preparing tax and financial analyses and cash flow models.

This role will be based out of our Portland, Maine office. Most of the time you will be working out of the Portland office or remotely with occasional meetings in the Portsmouth, NH office.

ESSENTIAL JOB FUNCTIONS:

- Work closely with the senior Wealth Advisor to deliver the Firm's wealth planning value proposition to client relationships
    - Prepare financial analyses and cash flow models for client presentations
    - Provide technical support to the Wealth Advisor in the delivery of estate planning and tax planning advice to clients
    - Gather relevant client data to complete wealth planning presentations on all topical areas (estate planning, insurance, outside investment accounts, tax information)
    - Conduct research and report to the team on various ongoing financial planning and tax topics
    - Attend client meetings where appropriate
- Work closely with the senior Wealth Advisor to drive the sales and marketing efforts of the Firm in attracting new client assets
    - Assist with the development, planning and execution of events and other activities that promote the Firm's business development objectives
    - Network among professionals within the communities in which we operate, presenting the Firm's value proposition to prospective clients to maintain and develop the relationship
- Work closely with the Firm's Client Relationship Associates (CRAs)
    - Communicate frequently and meet regularly (at least weekly) to discuss needs and activities, adequately prepare for meetings
- Document progress and completed tasks in our CRM software with satisfactory detail so that the current status can be easily understood by other members in the firm
- Participate in the enrichment of the Firm's culture and working environment
    - Develop strong working relationships across all organizational functions of the firm
    - Positively influence the professional environment of the Firm and the growth profile of the organization
    - Proactively bring ideas and opinions to the senior management team, particularly with any issues impacting the high-quality client experience the Firm aims to provide
- Play an active role in various firm committees – prepare and contribute thoughts for agendas, raise concerns, suggest solutions, look for and implement efficiency and process improvement
- Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive

KNOWLEDGE, SKILLS AND ABILITIES

- Excellent interpersonal skills and professionalism
- Analytical, organized and reliable
- Well-developed presentation skills, meticulous attention to detail
- Excellent project management skills with ability to prioritize and track multiple tasks in a fast–paced environment
- Demonstrated strong oral and written skills, a proven ability to effectively communicate with clients, their advisors, and fellow colleagues – both in-person and through various mediums
- Ability to adeptly handle confidential information and sensitive situations - position continually requires discretion, tact and diplomacy
- General understanding of the tax sensitivity of managing individual client, trust, and foundation accounts, trust and estate planning, and other related wealth planning concepts is paramount
- Knowledge of Tamarac (CRM and portfolio accounting software), Microsoft Teams and Schwab Institutional website a plus.
- Knowledge of, and strict adherence to, the Firm's compliance policies and procedures
- Ability travel for client/prospect meetings and other job-related activities, as well as between offices – currently located in Maine and New Hampshire

EDUCATION AND EXPERIENCE

- At least 2-5 years of experience in the financial services industry in a client-facing role, with record of fiduciary responsibility
- B.A./B.S. required, preferably in accounting, finance, economics or related field
- CPA, CFP or similar relevant professional designation preferred - designee or currently pursuing
- Series 65 is a requirement of the position and will be financially supported, as needed, by the firm

WHY WORK AT VIGILANT CAPITAL MANAGEMENT:

- Fantastic office locations in downtown Portland, ME and Portsmouth, NH
- Very competitive salary and bonus plan
- Excellent benefits
    - Employer-paid employee health insurance and HSA contribution
    - Employer-paid employee dental and vision plan
    - Employer-paid life and disability plans
    - Profit-sharing, with exclusive company-managed investment option
- Generous PTO plan
- Bi-annual company events
- …. And more

NO PHONE CALLS OR RECRUITERS PLEASE

Vigilant Capital Management is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability, veteran status, or any other status protected by law.