WEALTH MANAGEMENT EXECUTIVE SEARCH

June 2020 | Current Opportunities

Strategic Financial Planning

Managing Director | 15+ years Boutique RIA - 5mm-30mm level clientele	* New York, NY
Wealth Planner | 5-10 years National Wealth Management Firm- 10mm-100mm level clientele	* Louisville, KY * Naples, FL
Vice President/RM | 6+ years Multi-Family Office - 30mm-1B+ level clientele	* Orange County, CA
Cross Border Wealth Strategist | Bilingual-10+ years National Wealth Management Firm - 50mm-100mm level clientele	* Miami, FL
Director | 8+ years Boutique RIA - 5mm-30mm level clientele	* New York, NY
Financial Planning Associate | 3-7 years Wealth Management Firm - 10mm-50mm level clientele	* Los Angeles, CA * San Francisco, CA * New York, NY

Trust & Estate

V.P./Trust Officer | 4+ years Start-up Trust Company - 25mm-1B+ level clientele	* Reno, NV
Associate Vice President | 6+ years Multi-Family Office - 30mm-1B+ level clientele	* Orange County, CA
Compliance Associate | 5+ years Boutique Trust Company - 10mm-100mm level clientele	* Reno, NV
Compliance Officer | 8+ years Multi-Family Office - 25mm-1B+ level clientele	* Reno, NV * Newport Beach, CA

Estate Planning Partner | 15+ years Established Multi-City Law Firm - 10mm-100mm level clientele	* New York, NY
Trust Officer - Real Estate Trust| 6+ years Wealth Management Firm - 5mm-50mm level clientele	* California
Estate/Wealth Planner | 5+ years Boutique RIA - 25mm+ level clientele	* North Palm Beach, FL
Cross Border Wealth Strategist | Bilingual-10+ years National Wealth Management Firm - 50mm-100mm level clientele	* Miami, FL
Estate Settlement Manager | 10+ years Top Tier Wealth Management Firm - 7mm-50mm level clientele	* New York, NY * Delaware * Northern CA * Southern CA

Relationship Management

Relationship Manager | 6+ years Multi-Family Office - 30mm-1B+ level clientele	* Orange County, CA
Senior Relationship Manager | 10+ years Established RIA- 10mm-100mm+ level clientele	* Seattle, WA
RM/Wealth Advisor| 5+ years Investment Management Firm- 5mm-50mm+ level clientele	* Columbus, OH * Pittsburgh, PA

Ultra-High Net Worth Tax

International Tax Manager | 6+ years Multi-Family Office - 50mm+ level clientele	* New York, NY
Tax/Wealth Planning Associate | 4+ years Boutique RIA- 5mm-30mm level clientele	* New York, NY
Tax Manager | 6+ years Financial Services Firm - 50mm+ level clientele	* Atlanta, GA
Tax/Wealth Specialist | 4+ years Boutique Wealth Management Firm - 10mm-200mm level clientele	* Jupiter/North Palm Beach area, FL
Managing Director | 15+ years Boutique RIA - 50mm+ level clientele	* New York, NY
Director | 8+ years Boutique RIA - 5mm-30mm level clientele	* New York, NY

Tax/Wealth Associate | 3-7 years
Wealth Management Firm - 10mm-50mm level clientele

* Los Angeles, CA
* San Francisco, CA
* New York, NY

Investment Management

Wealth Advisor | 4+ years
Established RIA - 10mm-100mm level clientele

* Seattle, WA

Wealth Advisor | 5+ years
Investment Management Firm - 5mm-50mm level clientele

* Columbus, OH
* Pittsburgh, PA

Portfolio Manager | 8+ years
Multi-Family Office - 30mm-1B+ level clientele

requires connections in tech space

* San Francisco, CA

Financial Advisory/Business Development

Business Development Advisor | 5+ years
Top-Tier Wealth Management Firm-10mm+ level clientele

requires book or team liftout scenario

* Tri State area
* Boston, MA
* Florida
* California
* Illinois
* Texas

Portfolio Manager | 8+ years
Multi-Family Office - 30mm-1B+ level clientele

requires connections in tech space

* San Francisco, CA

Wealth Advisor | 5+ years
Investment Management Firm - 5mm-50mm level clientele

* Columbus, OH
* Pittsburgh, PA

Business Development Advisor | 6+ years
Wealth Management Firm-10mm+ level clientele

* Los Angeles, CA
* San Francisco, CA
* Newport Beach, CA
* Las Vegas, NV
* Denver/Boulder, CO

Open to opportunities in other locations? Click Here to select location preferences

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