



WEALTH
MANAGEMENT
EXECUTIVE
SEARCH

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June 2020 | Current Opportunities

Hiring Managers-are you looking to hire for similar positions?
Please reply to this email to speak with a member of our team

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