Withum Wealth Management is the wealth management division of WithumSmith+Brown, PC. Withum Wealth provides customized planning solutions and investment counsel to affluent individuals, families, professional groups, and small business retirement plans.

Our business continues to expand, and we are currently accepting resumes for **Relationship Manager** to join a team of trusted financial advisors.

The main responsibility is to build relationships with the Withum Irvine partners and develop new business. You will be working in our **Irvine, CA** office with periodic travel to our **California offices**.

Responsibilities:

- Work closely with senior advisors in maintaining existing relationships and generating new client opportunities
- Work closely with our team of advisors and act as a liaison with various account custodians
- Assist advisors in preparation of financial plans, retirement analyses and ad hoc planning requests from clients
- Prepare for client meetings, including preparing agendas; organizing client date; and preparing appropriate reports
- Work with team members to complete follow up tasks from client meetings, including recording meeting notes in CRM system; completing additional investment tasks; and corresponding with client
- Work with team members to provide clients with asset management solutions, including development of tax efficient strategies for portfolio management; coordination of withdrawal needs; rebalancing of portfolios and implementation of new portfolios
- Handle client service responsibilities, including regular client communications, client requests, and account reviews
- Execute clerical tasks including service requests, account paperwork and trading in client accounts
- Update and maintain client data in the firm's CRM

Requirements:

- Bachelor's degree in Finance or related field
- CFP designation preferred
- Excellent written and verbal communication skills
- Excellent computer skills, including ability to learn in-house software; software will include CRM, portfolio accounting systems, trading, rebalancing and financial planning software
- Client first attitude; highly motivated; team player; great organizational skills

To apply:

Interested and qualified candidates should apply to: infowwm@withumwealth.com | Email subject: CA Relationship Manager.