SENIOR WEALTH ADVISOR

Bray Executive Search, formerly RMG Associates, is a national executive search firm specializing in private wealth management. We have been retained by a nationally recognized multifamily-office who is seeking a Senior Wealth Advisor (SWA) for their regional office in Seattle, WA.

This prestigious, independent partnership is recognized as one of the leading wealth advisories in the industry. They have developed a platform and business model for the UHNW client segment allowing for highly customized and sophisticated solutions. The firm provides an encompassing, holistic scope of wealth management services including: investment management and impact investing, estate and tax planning, legacy/stewardship/governance consultancy, family education, philanthropy, trust and fiduciary services, and financial administration.

The focus of the SWA is new client business development and client relationship management. Candidates should have a demonstrated and proven record of successful client development and engagement as well as a network of existing prospects, contacts, and centers of influence. It is highly preferred that he or she have an area of subject expertise relevant to family wealth consultancy (planning, investment management, trust, tax, etc.). The SWA should have a wealth consulting orientation as he or she will profile prospects and clients regarding their values, needs and goals, as well as their full financial picture.

The SWA is a senior leadership role and will be part of the leadership team for this regional office. The SWA will work closely with client families with a focus on a consultative, multigenerational approach and have a thorough and comprehensive understanding of these families. The successful candidate must be able to embrace complex multigenerational and financial issues, and thrive working in a collaborative environment with a group of driven, high achieving professionals.

The SWA will be responsible for providing an extraordinarily high level of service to all clientele. He or she must have an established external presence and is expected to contribute to the leadership of the firm. This firm offers an impeccable service platform and reputation, a tremendously talented team, and collegial environment. This group prides themselves on their culture, and cultural fit is important.

Requirements:

- BA required; highly prefer graduate or professional studies, or certifications
- Minimum 10-15 years of wealth advisory to HNW/UHNW family clients
- Experience/expertise in multigenerational family client advisory
- Has a well-known and expert external presence and established centers-of-influence
- Focus on bringing in new UHNW family client accounts
- Expert knowledge of solutions across wealth management disciplines
- Proven ability to expand and enhance current book of business
- Proven ability to develop new business individually and in conjunction with team.

To apply, please submit your resume to jeannie@braysearch.com. For more information for qualified candidates, please call Buzz Bray at (206) 402-3401. Inquiries and applications will be held in strict confidence.