ABOUT KNIGHSTSBRIDGE WEALTH MANAGEMENT

Knightsbridge Wealth Management is a Registered Investment Advisor (RIA) headquartered in Newport Beach, CA with $800 million assets under management (AUM) and a 20-year history of helping clients achieve their financial goals. Our mission is to build a firm where we'd be happy to have our own family members be full-fee-paying clients, and we achieve this by living out our core values every day. These values include always doing what's best for the client, pursuing excellence in everything, treating each other well, and continuously adapting and improving.

WEALTH ADVISOR JOB DESCRIPTION

We're looking for an experienced financial professional to lead new client relationships at our growing firm. Knightsbridge This position offers direct access to the investment decision-making process, an environment where innovative thinking is valued, and collaborative mentorship from a veteran advisor and our firm's founder with 30+ years' experience. We'll supply the clients.

<u>The right candidate will:</u>

- Seek to build deep, long-lasting client relationships where interests are aligned
- Engage clients with the gravitas and presence necessary to lead a relationship
- Discuss personal finance and investment markets in a way that breeds confidence and trust
- Uphold the highest standards of professionalism, integrity, and respect
- Embrace a dynamic, fast-paced environment with a problem-solving mindset
- Be a self-starter and team player

<u>Responsibilities</u>

- Master and utilize the firm's array of investment solutions and tax strategies
- Prepare for and conduct prospect meetings and client reviews
- Design personalized and appropriate investment objectives
- Build and deliver comprehensive financial and tax plans with confidence and competence, cultivating trust in the firm's solutions and capabilities
- Execute proactive client outreach and respond to client inquiries
- Facilitate a seamless client onboarding process
- Direct operations and account service personnel to uphold an elevated, high-quality client experience
- Take on other duties, as assigned
- Ability to bring in new accounts is not required, but always welcome

<u>Qualifications</u>

- Bachelor's degree; CFA, CFP, or CPA strongly preferred
- 7+ years' experience in a client-facing or investment-related position
- 5+ years' experience as a wealth management advisor conducting client conversations required
- Experience at a large RIA ($2-10 billion AUM) preferred
- Familiarity with Tamarac, Schwab, Fidelity, RightCapital, and Holistiplan preferred

Knightsbridge
WEALTH MANAGEMENT

Benefits

- $130,000-$160,000 annual salary
- Annual bonuses tied to the number of client relationships independently owned
- 50% match of employee 401k contribution
- 100% coverage of employee’s health insurance premiums
- Three weeks paid vacation that increases with tenure
- One firmwide work from home day per week
- A fun annual company retreat