OSBORNE PARTNERS
Capital Management, LLC

Job Description – Wealth Counselor

Osborne Partners Capital Management offers the unique combination of sophisticated portfolio management and active financial planning. OPCM has an over 85 year history and manages over $2 billion in client assets as of 6/30/2022. Our employees are smart, experienced, and hardworking individuals without egos. Our Wealth Counselors are an important part of our offering. Wealth Counselors are the client relationship managers at Osborne Partners, providing portfolio management and financial planning guidance through phone conversations, email, and face-to-face meetings with our sophisticated clients. Wealth Counselors are assigned existing and new OPCM clients with the goal of building long-term relationships and matching our long-term client retention of 99%. There are no business development requirements for Wealth Counselors. Wealth Counselors reach out to clients proactively, explaining the firm's current economic outlook, educating clients on our investment philosophy, and addressing any financial planning questions or needs raised by clients. Additionally, Wealth Counselors work to grow their client service base through additions and referrals from existing clients. **This position can be based out of either of our offices: San Francisco or Menlo Park, CA.**

Qualifications include, but are not limited to:

- 7+ years of investment industry experience (hopefully being the main point of contact for clients)
- **CERTIFIED FINANCIAL PLANNER™ designation is required (ideally 5+ years experience creating plans from start-to-finish)**
- Very strong knowledge of finance and capital markets
- 4-year college degree with a preferred emphasis in economics, business, finance, accounting or similar field
- Strong abilities to multi-task, manage various client requests, prioritize
- Quality communication skills – listening to clients' needs and breaking down complex financial concepts
- Articulate and charismatic with a highly professional work ethic

Responsibilities include, but are not limited to:

- Acting as the main point of contact for the firm's clients (will be assigned ~100 clients/households over time)
- Conducting regular portfolio reviews with our clients (quarterly – phone/email/in-person)
- Working with our clients and the investment team to create appropriate asset allocations for clients' multi-asset class portfolios.
- Creating financial plans for our clients through in-depth discussions (eMoney)
- Act as liaison between our clients, the investment team, and Client Service Specialists (operations/back-office support)
- Introducing our clients to our Wealth Center application, which offers holistic financial views

OPCM offers a strong compensation and benefits package. Compensation includes a competitive salary and numerous bonuses – note there is no compensation ceiling for this position depending on a PC's work ethic, retention, and knack for client referrals. Benefits include medical, dental, and vision, along with 401K matching and a stock options plan.

To be considered for this position your resume must be accompanied by a cover letter summarizing your experience and why your background would be a good fit for the position. Please submit all documents including salary requirements to careers@osbornepartners.com. Thank you for understanding that no phone calls will be taken for this position.