



# A Career in Wealth Management

**HoyleCohen is growing!** Awarded *Best Places to Work* by San Diego Business Journal and InvestmentNews, we're seeking a **Wealth Advisor** in our San Diego office. Learn more and apply today!

Experienced. Dependable. Here to help you reach your career goals.

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## Introduction

The **Wealth Advisor** works in collaboration with and support of one or more advisory teams on the behalf of HoyleCohen offering financial guidance and investment strategy expertise to our clients and securing new client relationships.

## Our Story Paired with Purpose

HoyleCohen exists to serve its clients. By doing so, our clients are able to thoughtfully work towards their financial goals. We do this with passion and purpose and aspire to be: a high performance organization that works as one; motivated, productive, supportive, accountable; continuously learning, improving, innovating; with strong leadership, clear roles/goals, metrics, accountability; and an environment that inspires...passion with purpose.

## What We Offer

One of the **Best Places to Work!** Ranked #1 by InvestmentNews<sup>^</sup> in 2022 amongst Financial Advisers with 50+ employees and one of the Best Places to Work in San Diego by the San Diego Business Journal<sup>^^</sup> every year since 2016.

### The Opportunity

**Wealth Advisors** are core members of our client service teams. As a new member of the team, you would work directly with clients and in collaboration with the financial planning team, researching issues and solutions, and preparing and reviewing meeting materials. You will have an opportunity to learn from other Wealth Advisors and grow your technical expertise through collaboration with our specialized Investment Team. Client relations are paramount; demonstration of excellent listening skills and professionalism is key. HoyleCohen Advisory Team members are committed to continuous self-improvement and demonstration of HoyleCohen values; we display an eagerness to learn new skills and participate in special projects and tasks. We are team oriented, proactive, self-motivated, and accountable for our results.



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## What a Great Day Looks Like

Starting the day working with the investment team to coordinate trades on behalf of assigned clients. In doing so, we're helping clients get closer to their retirement accumulation or spending goals. Next you might spend time working with your advisory team colleagues to help prepare for the following week's Annual Review meetings to help clients track progress towards their desired outcomes. Lastly, you might spend time in conversation with a new/prospective client, learning more about their situation (personal, professional & financial), to build/implement a financial plan that will allow them to achieve their goals in a confident way.

## Who You Are

- You believe in excellence through effective collaboration and process
- You will do whatever it takes and go above and beyond for clients and each other
- You will demonstrate transparency with no hidden agenda
- You will exude a humble confidence without an ego

## Minimum Requirements

- Bachelor's Degree
- Must have CFP® certification (Certified Financial Planner)
- 2-5 years of client-facing experience in financial planning
- Knowledge of various investments including mutual funds, stocks, bonds, ETFs, Index funds, and private investments
- Excellent analytical and problem-solving skills
- Passion for exceptional client service, putting client needs first and working tirelessly to ensure every interaction is a positive one
- Compliance with rules/regulations as required by the firm and regulatory agencies

Awarded the  
*Top 5 Places to  
Work* by the San  
Diego Business  
Journal from  
2016 to 2021!



## Preferred Qualifications

- Experience with Tamarac (Advisor Rebalancing, Advisor View), Salesforce CRM, and Charles Schwab
- Advanced proficiency with Microsoft Office Suite
- Strong knowledge of taxation and financial planning concepts
- Ability to manage multiple clients/projects, work independently and problem solve

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## Our Core Values

[Delivering Results](#) | [Committing to the Greater Good](#) | [Acting with Integrity](#) | [Elevating Lives](#)

A close-knit team committed to providing the highest level of service, both internal and external

The opportunity to make a meaningful difference in the life of our clients

An entrepreneurial, rapidly evolving work environment that's collaborative and fun-loving but will also inspire and challenge you to give your best

## Generous Benefits\*

Medical  
Dental  
Vision

Blue Shield of California: PPO, HMO, or HDHP  
Kaiser Permanente: HMO  
Guardian Dental: PPO & HMO options  
VSP Vision: PPO

Other  
Insurance

Short-Term and Long-Term Disability, Life Insurance, all 100% company paid through UNUM

Time-off

Unlimited paid time off, 11 holidays, paid sick time, & volunteer time

Other  
Benefits

401k Plan, Flexible Spending Accounts, Employee Assistance Program, Supplemental Benefits, Incentivized Professional Development, & Remote Office Perks, monthly coffee chat meetups, monthly \$50 expense reimbursement



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## Hybrid Remote Work Policy

Our offices are open for our clients and staff. As such, the right candidate must live in or be willing to relocate to the local metro area and be able to commute to our San Diego office several times per month.

## About Your San Diego Workplace

A beautiful historic location reimagined for the demands of the modern workforce (think exposed brick, concrete ceilings and pillars, 14' windows, and expansive balconies), offering large, agile spaces with amenities that go beyond the nine-to-five workdays of the past (such as a fitness studio, craft coffee, and café) in the heart of Mission Valley.



It takes more than financial experience and expertise to become part of the HoyleCohen team. We insist on honesty, integrity, a passion for helping others, and a commitment to putting our clients' interests first – always.

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## Our Hiring Process

Our process is rigorous. Just as you would want to conduct your due diligence on any investment opportunity, we want all parties to have opportunities to talk to several members of the firm at varying levels, so we can make a mutually beneficial, informed decision. Our typical hiring process looks like this:

- **Round 1:** Introductory zoom interview with HR Director
- Behavioral, cognitive, and/or case study-based assessments
- **Round 2:** Zoom or in-person interview with hiring manager & department peer
- **Round 3:** Final zoom or in-person interview with senior partner(s)
- Conditional verbal offer (subject to background and reference check)
- Reference check (3 professional references/1 former manager)
- Congratulations and welcome to the firm!

We try to move quickly through this process, but we recognize that calendars don't always align, and it may be challenging to schedule. If at any time you are unsure of where you stand in the process, please reach out to Stacy Love, HR Director.

## Disclaimers

*\*Benefits are subject to change and eligibility requirements. This summary is not a guarantee of coverage.*

*HoyleCohen is an Equal Opportunity Employer. At HoyleCohen, we are committed to providing an environment of mutual respect where equal employment opportunities are available to all applicants and teammates without regard to race, color, religion, sex, pregnancy (including childbirth, lactation and related medical conditions), national origin, age, physical and mental disability, marital status, sexual orientation, gender identity, gender expression, genetic information (including characteristics and testing), military and veteran status, and any other characteristic protected under federal, state, or local law. HoyleCohen believes that diversity and inclusion among our teammates is critical to our success as a growing company, and we seek to recruit, develop, and retain the most talented people from a diverse candidate pool. All employment is decided on the basis of qualifications, merit, and business need.*

*^Methodology and Disclosures provided by Investment News:*

*Each year, this project is conducted in partnership with employee survey firm Best Companies Group. Winners are selected from a two-part survey completed by employers and employees. Employers report their organization's workplace policies, practices and demographics, and employees complete a survey designed to measure the employee experience. Scores from the employee survey represent three-quarters of the weight of the final rankings. To qualify as one of InvestmentNews Best Places to Work for Financial Advisers, an advice firm must have at least 15 employees and have been in business for one year. There is no charge to register.*

*^^Methodology and Disclosures provided by San Diego Business Journal:*

*Companies voluntarily participated in a two-part survey process to determine the Best Places to Work in San Diego. The first part consisted of evaluating each nominated company's workplace policies, practices, philosophy, systems, and demographics. The second part consisted of an employee survey to measure the employee experience. The combined scores determined the top companies and the final ranking. Best Companies Group managed the overall registration and survey process in San Diego, analyzed the data, and determined the final rankings.*

*Additional Disclosures: HoyleCohen applied for this award, and the information for the ranking was compiled by HoyleCohen and may or may not be verified by Best Companies Group. The award should not be viewed as representative of any one clients or employees experience and should not be taken as an indication of performance by HoyleCohen and any of its clients. Neither HoyleCohen nor any of its employees were required to be a member of an organization to be eligible to receive this award. HoyleCohen did not pay a fee to apply for this award. However, the firm does purchase goods or services from the publisher of the award, such as subscriptions to the publication.*