

Why Work for Us?

We build more than financial plans. We build careers.

HoyleCohen is **growing**.

Working for our firm isn't just about having a job, it's about feeling like an integral part of a supportive and collaborative team that devotes itself to changing people's lives for the better.

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

Contact us at (858) 576-7300 | [HoyleCohen.com](https://www.HoyleCohen.com) | © 2022 HoyleCohen, LLC

Our Story

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.

*Awarded **InvestmentNews'** Best Places to Work for Financial Advisors for 2021 & 2022 and the **Top 5 Places to Work** by the San Diego Business Journal from 2016 to 2021**

**See Disclosures on Page 4*

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 others)
- You will exude a humble confidence without an ego or hidden agendas

What We Offer

- Core values of delivering results, integrity, committing to the greater good, and elevating lives
- A close-knit team committed to providing the highest level of service
- An entrepreneurial, rapidly evolving work environment that's collaborative and fun-loving and will also inspire and challenge you to give your best

Our Benefits

Medical	Blue Shield of California: PPO, HMO, or HDHP Kaiser Permanente: HMO
Dental	Guardian Dental: PPO & HMO options
Vision	VSP Vision: PPO
Insurance	Short-Term & 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	401k Plan (<i>traditional or Roth with profit sharing contributions</i>), Flexible Spending Accounts, Employee Assistance Program, Supplemental Benefits, Incentivized Professional Development, Charity Donation Matching, & Remote Office Perks

Our 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 area that is hiring and be able to regularly commute to our office for team meetings and client meetings. On average, this ends up being one or two days a week.

Our COVID-19 Vaccine Policy

HoyleCohen has implemented a voluntary vaccination policy. Employees are encouraged, but not required to be vaccinated to be present in the workplace. We follow all CDC, CalOSHA, and local health guidelines as required.

Our Hiring Process

Our process is thorough and collaborative. We want all parties to have opportunities to talk to several people at varying levels, so we can make a mutually beneficial, informed decision. Our 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 if at any time you are unsure of where you stand in the process, please reach out to Stacy Love, Director, People and Culture.

Disclosures

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.

San Diego Business Journal's Best Places to Work

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 client's 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.