SAPERS & WALLACK

Creative thinking, Customized solutions. Caring about you since 1932.

Director of Wealth Management

Sapers & Wallack is a comprehensive wealth management, benefits and insurance services firm that has been delivering innovative, cost-effective solutions to clients since 1932. With over 80 years of experience, stability, and growth, Fortune 500 corporations, non-profits, venture-backed and private equity portfolio companies, family-owned businesses, and individuals alike appreciate the company's ability to deliver innovative, cost-effective solutions through a thoughtful, customized consultative approach. Now stewarded by the third generation of founding families, this boutique firm is looking for continued growth as they expand and solidify their reputation as the leading financial and benefits advisor to business and high net worth individuals in the New England Market.

The Director of Wealth Management will be an experienced and passionate Certified Financial Planner who will join the Sapers & Wallack leadership team as a key hire in expanding their wealth management practice. The ideal candidate will be confident in his/her ability to generate new business, as well as lead relationships on behalf of the firm with existing clients and identify additional services from other departments. We are looking for a candidate with an entrepreneurial spirit who is open-minded in their approach to acquiring new clients and delivering customized solutions. With ambitious growth targets set for the next few years, we are looking for an advisor that is interested in expanding the firm's existing structure and contributing to the overall long-term success of the practice.

Qualifications

- 5+ years of experience advising high net worth clients
- Strong track record of building their own book of business and generating new clients for their firm
- Certified Financial Planner© (CFP) designation required
- Strong knowledge of overall wealth management, investments, financial planning techniques, tax strategies, and estate planning solutions
- A self-starter that thrives on the opportunity to work in a growing, boutique firm and assist with developing systems, policies, and procedures
- Familiarity with SEI, Pershing, NetX360, eMoney, Money Guide Pro or other wealth software
- Familiarity with the Office 365 and SalesForce environment
- Series 65, Series 7, Series 63 Required
- Having an existing book of business to transit over is a plus

To apply contact Evan Macedo, Vice President of Finance & Operations, at emacedo@sapers-wallack.com.