Specialized Wealth Services - Sr. Advisory Specialist
Philanthropic Services
Job # 5345835

Position: SWS Sr. Advisory Specialist (LO) 2, Philanthropic Services

Location: San Francisco, Palo Alto, Walnut Creek, Roseville, Sacramento, CA

It starts with you. Our goal is to attract, develop, retain and motivate the most talented people - those who care and who work together as partners across business units and functions. We value and promote diversity and inclusion in every aspect of our business and at every level of our organization.

Wells Fargo & Company (NYSE: WFC) is a nationwide, diversified financial services company with $1.7 trillion in assets. Founded in 1852, Wells Fargo provides banking, insurance, investments, mortgage, and consumer and commercial finance through more than 9,000 locations, more than 12,500 ATMs, online (wellsfargo.com), and mobile devices. Wells Fargo has more than 265,000 team members in 36 countries across our approximately 90 businesses. Wells Fargo & Company was ranked No. 30 on Fortune's 2015 rankings of America's largest corporations. Wells Fargo's vision is to satisfy our customers' financial needs and help them succeed financially. Wells Fargo perspectives are also available at **Wells Fargo Blogs** and **Wells Fargo Stories.**

Wealth and Investment Management (WIM) is one of the company's four main divisions. WIM businesses build enduring client relationships through sound, thoughtful and objective advice. We help our clients by developing individualized plans for everything from retirement goals to business succession planning, to family legacy intentions. Services include comprehensive planning and advice, investment management, brokerage, private banking, estate planning strategies, trust, insurance and both individual and institutional retirement.

Wealth Management (WM): Wealth Management business is a leading provider of financial services to high-net worth clients through Wells Fargo Private Bank, and to the affluent segment through partnerships between Wealth Brokerage Services and the Community Bank. In Wealth Management, clients are provided with a complete range of solutions to help them manage, preserve and transfer their wealth.

Job Description:

This Philanthropic Services Sr Advisory Specialist is a specialty fiduciary expert that applies extensive knowledge and skills in the area of trust and estate matters, investment management, wealth transition, and financial planning to serve high net worth clients with the most complex planning needs. May partner with a Relationship Manager or act as Relationship Manager in serving clients. Contributes to growth of the specialty wealth management business by participating in and initiating new client acquisition through leveraging fiduciary skills and specialized knowledge in the marketplace. In some cases, may administer and manage the risk of moderately complex trust accounts in order to develop or expand relationships. As the relationship manager for a book of business, identifies and addresses issues with clients, underwriting/accepting new accounts, administering, terminating, distributes moderately complex accounts.

Proactively engages with clients in specialty wealth planning related conversations; collaborates with partners to develop and propose solutions. Provides analysis of client's total financial situation and offers creative thinking to arrive at workable solutions. Communicates directly with clients, business partners and Centers of Influence including external resources i.e. accountants, attorneys, who are related to the client relationship as part of day to day administration. May be a team lead. This LO position has customer contact and job duties which may include needs assessing and referring those customers interested in a dwelling secured product to a SAFE team member. This position includes assisting customers without taking an application and without offering or negotiating terms of a dwelling secured transaction. Individuals in a LO position also must meet the Loan Originator requirements under Regulation Z (LO) outlined in the job expectations below.

Position will sit at one of the following California locations:

301 University Avenue, Suite 200, Palo Alto, California 94301
2001 North Main Street, Suite 410, Walnut Creek, CA 94596
400 Capitol Mall, Suite 2100, Sacramento, CA 95814
1512 Eureka Road, Suite 300, Roseville, CA 95661
420 Montgomery, San Francisco, CA 94104

Required Qualifications

- 10+ years trust/fiduciary experience demonstrated through work, military or education experience

Desired Qualifications

- A Masters of Business Administration (MBA) or Juris Doctor (JD)
- A Masters of Business Administration (MBA) or Chartered Financial Analyst (CFA) Designation
- Certified Trust and Financial Advisor (CTFA)
- Knowledge and understanding of philanthropic concepts
- Knowledge and understanding of institutional investment management or endowment/foundation management
- Knowledge and understanding of fiduciary law and federal regulations

Other Desired Qualifications

- Established network in the local market
- Significant experience with family philanthropy, including private foundations, donor advised funds, split-interest trusts, family retreats, workshops and meetings
- Experience in wealth management with net worth clients of at least five million dollars
- Extensive knowledge and understanding of financial and estate planning, fiduciary/trust, wealth transfer, leverage, multiple asset class usage, asset allocation strategies, and taxation
- Local market knowledge; extensive local philanthropic network; strong networking skills and a passion for philanthropy
- Chartered Advisor in Philanthropy (CAP) designation

Job Expectations

Individuals in Loan Originator (LO) positions must meet the Consumer Financial Protection Bureau qualification requirements and comply with related Wells Fargo policies. The LO qualification requirements include meeting applicable financial responsibility, character, general financial fitness and criminal background standards. A current credit report will be used to assess your financial responsibility and credit fitness, however, a credit score is not included as part of the evaluation. Successful candidates must also meet ongoing regulatory requirements including additional screening, if necessary.

Salary Information

To be determined

Disclaimer

All offers for employment with Wells Fargo are contingent upon the candidate having successfully completed a criminal background check. Wells Fargo will consider qualified candidates with criminal histories in a manner consistent with the requirements of applicable local, state and Federal law, including Section 19 of the Federal Deposit Insurance Act.

Relevant military experience is considered for veterans and transitioning service men and women.

Wells Fargo is an Affirmative Action and Equal Opportunity Employer, Minority/Female/Disabled/Veteran/Gender Identity/Sexual Orientation.

How external candidates apply:

Go to www.wellsfargo.com/careers

- *Click in the red box that says "**Start Your Future Now**" on "**Search Jobs**"*
- *Click on the blue box that says "**Search Jobs Now**"*
- *Click on **"**New job seekers **— Register now**"*
- *Enter your **User Name**, **Password, Name, Contact Information** and click "**Register**"*
- *Click on the small click on the left that say "**Submit/Update Profile**"*
- *Follow steps listed on the screen to complete your profile:*
    - *Copy and paste or attach a resume*
    - *Enter Employment Preferences: **IMPORTANT: If a job you are applying for requires a license or certificate, you must include it here (even if it is on your resume), or the system will decline your application.***
    - *Please enter your FULL (legal) name and address*
    - *Confirm your candidate profile status is "**Searchable**"*
- *To complete your profile, click "**Submit Profile**".*
- *Search the Job Opening ID (5345835) of interest and APPLY – follow the 6 steps on the screen to complete the application and make sure you see a successful application notice.*