

Planner

Location: Westlake Village, CA

Job Type: Permanent Full Time

Area of Interest: Private Client/Wealth Management

Web Site: www.onecapital.com

Company Description: One Capital Management, LLC (“OCM”) is a leading global wealth management firm that offers diversified wealth management services to private clients, endowments and foundations, investment companies and institutions in the U.S. and Canada. OCM is well-positioned to tailor wealth management solutions for its clients through its wealth forecasting group and integrated investment management service.

- Global depth and resources.
- Fiduciary guidance - the firm is structured to always act in our client’s best interest.
- Proprietary wealth management capabilities.
- Customized investment solutions delivered through our portfolio management group coupled with alternative investments integrated where appropriate.
- Over \$5 Billion assets under management.

Position Description: The One Capital Management Wealth Management Group is in search of a Planner to support the firm’s Wealth Management Group. The Planner is an associate position and will play an integral role in the firm’s growth strategy. The Wealth Management team focuses on delivering the full scope of the firm’s wealth and advanced planning capabilities to private clients, foundations, endowments, and investment advisors.

Specific responsibilities may include but not limited to:

- Working with our senior investment professionals to construct capital asset forecasts.
- Analyzing client portfolios to create personal wealth forecasts, investment plans, and investment policy statements.
- Managing the creation and quality of wealth forecast presentations.
- Liaising with other departments internally including all Advisors, Senior Portfolio Managers, Sales/Marketing, Trading, and Investment Operations.
- Overseeing the firm’s planning software updates to reflect current capital asset projections, tax, legal, and regulatory environment.
- Producing firmwide planning and strategy research.

Job Requirements: The candidate must have a bachelor’s degree. The candidate should have at least 3 years’ experience in wealth planning. He/she should have strong analytical ability, quantitative skills, and understanding of financial markets. Proven problem-solving skills are essential. Strong attention to detail with the ability to multitask and prioritize in a deadline driven environment required. He/she should also possess strong communication skills (both written and verbal) and interpersonal skills. He/she must be comfortable working independently while also collaborating as part of a team. The CPWA® or CFP® designations are preferred but not required.

Compensation & Benefits

- Salary range: \$70,000.00 - \$80,000.00
- Bonus
- Participation and coverage under the company health care plan.
- Participation in the Company 401(k) Plan on first day of hire.
- Reimbursement up to \$75.00 a month for membership fees paid as part of the company Wellness Program.
- Flexible and responsible unlimited paid time off (PTO).
- Company sponsorship in continuing education.

Interested applicants should submit their resume to hiring@onecapital.com