

Wealth Management Senior Analyst (Director)

Location: Westlake Village, CA

Job Type: 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.
- Proprietary wealth management capabilities.
- Customized investment solutions delivered through our portfolio management group coupled with alternative investments integrated where appropriate.
- Over \$8 Billion assets under management.

Position Description: The One Capital Management Wealth Management Group is in search of an analyst to support the firm’s Wealth Management Group. The Director will serve as a senior leader within the Wealth Management Group, playing an integral part in driving the firm’s growth strategy and delivering its full scope of wealth and advanced planning capabilities. This position is designed for an experienced professional capable of operating with significant autonomy to solve complex wealth and investment policy challenges for the firm’s most sophisticated clients. The Director will be a thought leader, responsible for shaping strategy, mentoring junior analysts, and ensuring the highest quality of analytical output. 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 are not limited to:

- Leading the development of sophisticated, customized financial analyses and strategic solutions for the firm’s clients, including brainstorming on business exceeding \$10 million.
- Taking an active and primary role in presenting complex analyses, findings, and strategic recommendations directly to clients, prospects, and intermediaries.
- Overseeing the firm’s planning software updates to reflect the current capital asset projections, tax, legal, and regulatory environment.
- Producing firm-wide planning and strategy research to inform investment policy and enhance client service models.
- Leading the quality control process for Wealth Forecasting Analyses (WFAs) to ensure the highest standards of accuracy and consistency.

- Training and mentoring new Advisors and Associates on the firm's analytical tools, processes, and wealth management philosophies.
- Identifying key client planning issues, strategizing innovative solutions, and helping to build custom analytics to meet evolving client needs.

Job Requirements:

- A bachelor's degree is required; an advanced degree is a plus.
- Candidates must have at least 3 years of significant experience in wealth planning, with a proven track record of managing complex client relationships and analyses.
- Superior analytical and strategic problem-solving skills are essential, with the ability to think creatively and develop innovative solutions for sophisticated clients.
- Mastery of eMoney software, PowerPoint, Excel, and Morningstar Direct is required.
- Exceptional communication and presentation skills, with the ability to articulate complex concepts and analytics confidently and clearly to clients, prospects, and intermediaries.
- Demonstrated leadership qualities, with experience or a strong desire to train and mentor junior team members.
- Must be a self-starter comfortable working with a high degree of autonomy, while also possessing strong interpersonal skills to lead and collaborate within a team environment.

Preferred:

- Experience with Holistiplan.
- The CPWA®, CFP®, or CFA® designation is strongly preferred.
- Recent experience working for a Registered Investment Advisor.

Compensation & Benefits

One Capital Management offers competitive compensation and benefits package designed to attract and retain top talent. The total compensation for each role will commensurate with the candidate's experience and the responsibilities of the position.

The package includes:

- Competitive base salary and annual bonus potential.
- Eligibility to participate in the company's health care plan. Current plan options include select plans that cover the full premium for employees and their eligible dependents.
- Participation in the Company 401(k) Plan, available from the first day of hire.
- A company Wellness Program, which includes reimbursement of up to \$75.00 per month for membership fees.

- A flexible and responsible paid time off (PTO) policy.
- Company sponsorship for approved continuing education and professional development.

Interested applicants should submit their resume and a cover letter detailing their qualifications and interest in the specific role to hire@onecapital.com. Please include the position title in the subject line of your email.

Pay Range: \$100,000.00 - \$125,000.00

One Capital Management, LLC is an Equal Opportunity Employer.