

Wealth Management Analyst (Planner)

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 Associate will play an essential role in the firm’s growth by supporting the Wealth Management Group’s senior professionals. This position is designed for a candidate eager to build a strong foundation in wealth management. The Associate will receive extensive training on our internally developed analytical tools and custom analytics, becoming well-versed in asset allocation theory, taxes, and retirement, trust, and estate planning issues. 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 senior investment professionals to construct capital asset forecasts.
- Analyzing client portfolios to create personal wealth forecasts, investment plans, and investment policy statements.
- Completing complex Wealth Forecasting Analyses (WFAs) and creating customized analyses for specific client situations.
- Interpreting data from analyses to assist advisors in making investment and planning recommendations for clients and prospects.
- Assisting in the creation and quality control of wealth forecast presentations and other client-facing materials.
- Participating in beta testing for enhancements to the firm’s analytical tools and software.

- Working as a collaborative team member on various projects and contributing to brainstorming sessions on client planning issues.
- Developing expertise in asset allocation theory, taxes, and retirement, trust, and estate planning issues.

Job Requirements:

- A bachelor's degree is required.
- Candidates should have 1-2 years of experience in wealth planning or a related financial services field.
- Excellent analytical and problem-solving skills are required, along with intellectual curiosity and the ability to think creatively.
- Experience with or mastery of eMoney software, PowerPoint, and Excel are required.
- Experience with Morningstar Direct and Holistiplan is a plus.
- Strong communication (both written and verbal) and interpersonal skills are essential, coupled with a desire to develop presentation abilities and a willingness to accept feedback.
- Must possess strong attention to detail and the ability to prioritize, multitask, and work effectively under pressure to meet tight deadlines.
- The candidate must be comfortable working independently while also collaborating as part of a team.
- Completion of or progress towards a CPWA®, CFA®, or CFP® designation is a plus.

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: \$70,000.00 - \$90,000.00

One Capital Management, LLC is an Equal Opportunity Employer.