FULCRUM
CAPITAL

# Advisor

This is a great opportunity for a wealth advisor or portfolio manager with a passion for investing and for serving clients to join one of the fastest-growing independent wealth advisors in the Pacific Northwest. This position is located in Seattle and is suitable for someone in the middle part of their career.

The Advisor will engage with individual and nonprofits clients to understand their financial goals, manage their investments, and deliver high-performing and sustainable solutions. As an ambassador for Fulcrum in the community, the Advisor will inspire growth and opportunity, particularly in the realm of values-aligned investing and wealth management.  The Advisor will also serve as a voting and contributing member of the firm's Investment Committee.

## Responsibilities

- Advise, educate, and serve clients and coordinate the implementation of their financial strategies, including:
  - Investment management and analysis
  - Integration of environmental and social values
  - Financial planning, modeling, and policy development
  - Business and executive transitions
  - Coordination with outside advisors, including CPAs and attorneys
- Support nonprofit clients with investment and spending policy development, scenario analysis, mission-related investment strategies, and governance
- As a voting member of the Investment Committee, contribute to investment decisions and messaging regarding manager and security selection, portfolio construction, sustainability/ESG, asset allocation, and global investment themes
- Generate, close, and on-board new business opportunities
- Assist with responses to institutional RFPs and deliver finals presentations
- Represent the firm at various functions and contribute to articles and social media
- Stay up-to-date on investment, tax, governance, ESG, and financial planning topics through conferences and other educational opportunities
- Mentor junior team members who are interested in career tracks that include client service, financial planning, and/or investment management

## Qualifications and attributes

- Minimum 8 years of financial services industry experience, including at least 4 years of professional investment management experience
- Bachelor's Degree from an accredited college or university in a finance-related field
- Chartered Financial Analyst® and CERTIFIED FINANCIAL PLANNER™ designations preferred
- Familiarity with Salesforce and eMoney Advisor preferred

- Experience serving on nonprofit boards preferred
- Excellent written and verbal communication skills
- Passionate about client service and diligent about confidentiality
- A demonstrated ability to retain and manage large client relationships
- Open-minded, curious, and driven toward continuous improvement
- A team player
- Highly proactive and self-motivated
- Able to make decisions, persuade others, and be persuaded in the face of uncertainty or adversity

## Compensation and benefits

- Pay and benefits competitive with industry standards
- Base salary determined by experience and education
- Full benefits including healthcare, bus pass, gym membership, and profit sharing
- Clear path to ownership
- Support for relevant career development opportunities

## Company Description

Fulcrum Capital attracts and retains the most talented, credentialed, and community-minded professionals in wealth management. Every member of our seasoned team is passionate about helping clients achieve their financial goals.

Founded in 2007, Fulcrum Capital, LLC is an independent Registered Investment Advisor headquartered in Seattle. Our clients are individuals, families, and nonprofits with vision, character, and integrity. Clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their values. Our clients and team members value our independence, transparency, and thought-leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is 100% employee-owned and majority-women-owned.

Qualified candidates please contact:

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