
Senior Investment Advisor, Business Development

California Fiduciaries

LOCATION	Anywhere in California
EMPLOYMENT TYPE	Full time
LOCATION TYPE	Remote
DEPARTMENT	Investment Platform

Overview

We are a profitable, mission-driven fintech company building financial solutions for people whose needs go unmet by traditional institutions – people with disabilities, older adults, and people in recovery, and the families and professionals who care for them. We get to wake up every day knowing our work has a profound impact on our customers' lives, and we run the business with the discipline to keep doing it for the long haul. That track record has earned us a spot on the Forbes Fintech 50 and the Inc. 5000 list of America's fastest-growing companies for the last two years.

We're looking for an experienced senior financial advisor to drive growth of True Link's investment advisory services for professional fiduciary clients. This person will leverage True Link's strong brand, differentiated technology and tailored investment approach for people with complex needs to deepen and scale relationships with professional fiduciary clients. We're seeking candidates who are excited to bring their investment advisory experience, along with a desire to be entrepreneurial and grow a business that will have meaningful impact on clients' lives. This is a hands-on leadership role, where you'll take the business line to scale and collaborate cross-functionally on this important work. This role is ideally based in California.

What You'll Do

- Lead relationship development with professional fiduciaries across California, building on the more than \$100M in assets we manage today for professional fiduciaries and their clients, and growing well beyond it.
- Provide investment consultations and platform demos to prospective professional fiduciary clients.
- Engage existing fiduciary clients on planning and account updates, including leading quarterly investment reviews.
- Develop investment recommendations and reassess investment strategies as client needs evolve.
- Steward our relationship with the Professional Fiduciaries Association of California (PFAC). Develop presentation and educational content for conferences and help shape our business development strategy.
- Represent True Link at PFAC conferences and chapter meetings throughout the state.
- Collaborate cross-functionally across True Link with our client services, operations, and new account opening teams.

- Travel at least ~30% of the time, primarily within California.

Who You Are

- 10+ years of client-facing investment advisory experience.
- Track record of building strong client relationships and leading significant asset growth in a business development role.
- Preference for experience working with professional fiduciary clients in California and an existing network in these communities.
- Excitement about learning and teaching new technology platforms.
- Experience working with trust companies and attorneys a plus.
- Entrepreneurial mindset, eager to test and learn.
- Series 65 or Series 7 / 66 required within 90 days of hire.
- Preferred qualifications: CFP certification, knowledge of special needs trusts and trust administration, ChSNC certification.

Why You'll Love Us

- We operate with the pace of a startup, the rigor of a financial services firm, and the mission-orientation of a company that deeply cares about the people it serves.
- With fifty million Americans in our addressable market, we are building for the millions of people who need our products and services across the country – and we've got the potential to reach many more.
- We have the privilege of providing financial protection for vulnerable members of society and partnering with expert service providers to do so. Our customers and partners love us, and we love them back. You can sleep soundly every night knowing you are doing a great thing by getting our services into more hands.
- We treat one another like we treat our customers: with respect and dignity. Diversity, equity, and inclusion are cultural values we take very seriously, and we welcome and recruit team members of all backgrounds and identities.
- We offer competitive wages, health, dental & vision coverage, paid parental leave, 12 paid holidays each year, your own professional development budget, and generous vacation.
- The majority of us work from home from all across the US, and we enjoy connecting virtually for laughs with teammates and meeting up in-person: we have small offices in SF and in Kingston NY, and we plan team get-togethers around the country.

If you are a high-performing person who wants to join a diverse, inclusive team and use your skills to make a real impact in people's lives, we invite you to apply to join our team.