Job Opening ID: **5075299 – ATLANTA LOCATION**
Job Posting Title: **Wealth Management Fiduciary Advisory Specialist 2**

This position will focus on philanthropic business development and philanthropic account management.
Fiduciary expert that applies knowledge and skills in the area of trust and estate matters, investment management, wealth transition, charitable and financial planning to serve high net worth and institutional clients. May partner with a Relationship Manager or play the role of a Relationship Manager in serving clients. Contributes to growth of the wealth management business by participating in and initiating new client acquisition through leveraging fiduciary skills and knowledge in the marketplace. In some cases, may administer and manage the risk of moderately complex trust accounts in order to develop or expand Wealth Management Group (WMG) relationships. Responsible for sourcing new business and expanding current relationships by meeting with clients and prospects, and partnering with other WMG professionals in proactive, demand-creating activities.

Serves as relationship manager or team member for a book of primarily charitable/philanthropic business, identifying and addressing wealth management issues with clients, underwriting/accepting new accounts, administering, terminating, and distributing moderately complex accounts of all types in collaboration with the Trust Centers. Proactively engages with clients in wealth planning related conversations; collaborates with partners to develop and propose solutions. Works with investment manager to assist in asset allocation, gathering information to value assets and developing investment strategy. Must have a Charitable/Philanthropic account management focus. Provides analysis of client's total financial situation and offers creative thinking to arrive at workable solutions. Communicates directly with clients, business partners and Centers of Influence including external resources such as accountants, attorneys, etc., who are related to the client relationship as part of day-to-day administration. Responsible for corporate regulatory and compliance standards.

This is a regional position with primary focus on Atlanta, and with responsibilities throughout Greater Georgia, Nashville and Birmingham.

Basic Qualifications
6+ years of financial and/or estate planning experience in Wealth Management arena. Persons in this position must meet the Consumer Financial Protection Bureau loan originator qualification requirements and must comply with Wells Fargo policies related to these requirements. The loan originator qualification requirements include meeting applicable financial responsibility, character, credit fitness and criminal background standards. Successful candidates must also meet ongoing regulatory requirements including additional screening.

Minimum Qualifications
Extensive knowledge of financial and estate planning, fiduciary/trust, wealth transfer, leverage strategies, multiple asset class usage, asset allocation strategies, taxation, and broad knowledge of fiduciary law and federal regulations. Demonstrated experience in wealth management with clients with net worth at least $2mm. Client management relationship experience. Strong communication and presentation skills.

Additional Minimum Quals

- 6+ years financial services industry experience with a focus on both individual Charitable Trust and Institutional Nonprofit management
- Significant experience with philanthropic vehicles, such as endowments, planned gifts, private foundations, split-interest charitable trusts, and donor advised funds
- Proven success in business development and/or sales

Preferred Qualifications
- Significant experience with family foundations, including facilitating family retreats, workshops and meetings
- Significant experience with philanthropic business development, sales, and client relationship management; experience writing / responding to prospect RFPs
- Fluency with nonprofit data resources, such as Guidestar
- Ability to work independently in managing nonprofit and high net worth philanthropic client relationships
- Experience preparing and delivering presentations, especially to nonprofit boards and philanthropic audiences
- Local market knowledge; extensive local philanthropic network; strong networking skills and a passion for philanthropy

How to apply
To apply for this position, visit the careers page at WellsFargo.com, or cluck here:
https://employment.wellsfargo.com/psp/PSEA/APPLICANT_NW/HRMS/c/HRS_HRAM.HRS_APP_SCHJOB.GBL?FOCUS=Applicant