



Wealth Manager – San Diego, CA

Responsibilities:

California Bank and Trust Wealth Management Group is seeking a **Wealth Manager** to develop and maintain private client relationships in the San Diego area. The Wealth Manager is responsible for advising clients on financially related issues, developing recommendations for asset management and assisting in the active management of clients' marketable securities portfolios. Other solutions offered include insurance, trusts services and referrals to strategic partners in private, commercial and investment banking.

The ideal candidate will:

- Possess in-depth knowledge of a full-range of investments and insurance vehicles
- Have excellent communications, relationship management and sales skills
- The ability to effectively advise some of the Bank's largest clients

Requirements:

- 7+ years directly related experience
- Banking/Investments experience
- NASD Series 63, 65, and 7 licenses
- Certified Financial Planning (CFP) designation
- Strong computer skills
- Excellent oral and written communication skills
- Exceptional analytical skills

To apply for this position please send your resume to trina.eyring@zionsbancorp.com or call 801-844-7572.