



## Client Advisory Associate Position Profile – Costa Mesa Office

### **THE COMPANY**

Whittier Trust Company and The Whittier Trust Company of Nevada, Inc. (collectively “Whittier Trust”) are, respectively, California and Nevada state-chartered trust companies with over 135 wealth management professionals and offices in South Pasadena, Costa Mesa, San Francisco, Reno, and Seattle. Whittier Trust provides fiduciary, investment management, philanthropic and ancillary family office services to high net worth individuals and families, and their related trusts, foundations, and other entities. Viewed collectively, Whittier Trust is the largest private “multi-family office” headquartered on the West Coast and manages and consults on more than \$10 billion in assets for 349 different families with an average account size of nearly \$35 million.

For more information, please visit [www.whittiertrust.com](http://www.whittiertrust.com).

### **POSITION SUMMARY**

Whittier Trust seeks a Client Advisory Associate professional. Our Client Advisory Associates support Senior Client Advisors with client account management and business development. They are integral in delivering Whittier’s service platform which encompasses the five pillars of wealth management: investment management, family office services, trust services, philanthropy, and real estate/oil and gas.

### **DESIRED CANDIDATE**

- x Bachelor's degree from an accredited university.
- x Superior skills and experience with Microsoft Office, especially Word, Excel and PowerPoint.
- x Excellent written and oral communication skills.
- x Superior organizational skills with ability to multi-task and to manage and prioritize multiple projects and competing deadlines.
- x Excellent attention to detail with the ability to exercise independent judgment.
- x Ability to learn new processes and programs and desire to grow with the company.

### **PERSONAL CHARACTERISTICS**

- x Strong people skills.
- x Client service focus.
- x Effective verbal and written communication skills.
- x High integrity with a diligent work ethic.
- x Team/people oriented.
- x Highly organized with good time management skills.
- x Meticulous attention to detail.

### **COMPENSATION**

A competitive base salary, performance bonus, and benefit plans including medical, dental, vision, life, accidental death & dismemberment, long term disability, and 401k or Roth with 25% match on first 6% of base compensation are offered.

A working-visa sponsorship is not available. Applicant(s) must be currently authorized to work in the United States.

Resumes and corresponding documentation may be submitted confidentially to [hrdept@whittiertrust.com](mailto:hrdept@whittiertrust.com).