Advisor

Vista Capital Partners

Vista Capital Partners is one of the leading financial advisors in the Pacific Northwest and has become a career destination. Our unique investment philosophy, standard-setting client services, career-pathing, and engaging work environment help to attract and retain top talent. Our core purpose is to build happier and more prosperous lives.

We believe a healthy work/life balance is essential—happy employees provide the best possible service to our clients. To that end, we engage in regular team-building exercises, provide time for employees to volunteer in the community, and offer periodic sabbaticals.

We are hiring an Advisor to join our talented team of financial service professionals.

Job Summary

The Advisor plays an integral part of a three-person client service team that leads and advises clients on our investment philosophy and financial planning strategies. We are looking for an individual who works well in a team environment and can provide superior client service.

Duties and Responsibilities

Advisor responsibilities include the following:

- Perform daily trading, rebalancing and portfolio analysis
- Analyze client data within a financial planning context
- Develop financial plans with scenarios and recommendations
- Prepare investment policy statements and client presentations
- Meet with clients, prospects and other professionals
- Facilitate client meetings and communications
- Perform investment and wealth management research projects
- Perform other duties as assigned by client service team

Core Values

We will hire the person who best embodies and embraces Vista's core values:

- **Act with Integrity**

  Successful relationships are built on trust.

- **Strive for Simplicity**

  Keeping things simple allows us to focus on what truly matters.

- **Be Passionate**

  An unwavering belief in what we're doing brings out the best in us. Passion inspires and is contagious.

- **Demand Excellence**

  Our clients and colleagues deserve our best effort. Always.

- **Enjoy the Journey**

  A fun and flexible work environment allows our people to enjoy happy and fulfilling lives.

Qualifications

The Advisor position typically requires the following qualifications:

- Minimum 5-7 years business experience, preferably in the financial services industry and ideally in a client-facing role
- CFP, CFA or MBA preferred

Salary and Benefits

Pay and benefits are competitive based on industry standards:

- Salary based on experience
- Bonus
- Profit sharing
- Benefits include health care, paid time off, sabbaticals and 401(k)
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

How to Apply

Interested applicants should send their resumes with a cover letter to: Tana Thomson, tana@vistacp.com. Mailing address is:

Vista Capital Partners
9755 S.W. Barnes Road, Suite 595
Portland, OR 97225

We will contact you if we believe your qualifications meet our needs. Thank you!

VISTA CAPITAL PARTNERS IS AN EQUAL OPPORTUNITY EMPLOYER