Sr. Regional Fiduciary Manager – Philanthropic Services - California & Southwest Region

Job #5298944

Position: **Sr. Regional Fiduciary Manager – Philanthropic Services - California & Southwest Region**

Location: San Francisco, Los Angeles, Dallas-Fort Worth, Houston, or Scottsdale.

It starts with you. Our goal is to attract, develop, retain and motivate the most talented people - those who care and who work together as partners across business units and functions. We value and promote diversity and inclusion in every aspect of our business and at every level of our organization.

Wells Fargo & Company (NYSE: WFC) is a nationwide, diversified financial services company with $1.7 trillion in assets. Founded in 1852, Wells Fargo provides banking, insurance, investments, mortgage, and consumer and commercial finance through more than 9,000 locations, more than 12,500 ATMs, online (wellsfargo.com), and mobile devices. Wells Fargo has more than 265,000 team members in 36 countries across our approximately 90 businesses. Wells Fargo & Company was ranked No. 30 on Fortune's 2015 rankings of America's largest corporations. Wells Fargo's vision is to satisfy our customers' financial needs and help them succeed financially. Wells Fargo perspectives are also available at **Wells Fargo Blogs** and **Wells Fargo Stories.**

Wealth and Investment Management (WIM) is one of the company's four main divisions. WIM businesses build enduring client relationships through sound, thoughtful and objective advice. We help our clients by developing individualized plans for everything from retirement goals to business succession planning, to family legacy intentions. Services include comprehensive planning and advice, investment management, brokerage, private banking, estate planning strategies, trust, insurance and both individual and institutional retirement.

Wealth Management (WM): Wealth Management business is a leading provider of financial services to high-net worth clients through Wells Fargo Private Bank, and to the affluent segment through partnerships between Wealth Brokerage Services and the Community Bank. In Wealth Management, clients are provided with a complete range of solutions to help them manage, preserve and transfer their wealth.

This position is part of the **Philanthropic Services Specialized Wealth Services Group**.

The Senior Regional Fiduciary Manager (RFM) is responsible for leading a team of philanthropic specialists in growing and retaining philanthropic individual and institutional relationships by integrating fiduciary/prudent investment principles and knowledge, philanthropic consulting and planning knowledge (trust, taxes, retirement, gifting, business succession planning, estates and wealth transfer strategies), investment acumen and business development. At the regional level, the Sr. RFM is accountable for revenue growth, client retention, business economics and risk management (provides fiduciary oversight, reviewing documents, negotiating fees and approving discretionary distributions, assuring proper controls and satisfactory audits) across philanthropic fiduciary activities.

The Senior RFM provides coaching to team members in promoting solutions grounded in the application of fiduciary/prudent investment and philanthropic consulting and planning knowledge, as the foundation for client relationship management and expansion. The Senior RFM is the chief advocate of philanthropic services in a market, operating as strategic wholesaler to uncover channel growth opportunities within Wealth, across Wealth, Brokerage & Retirement and Wells Fargo & Co. This position will have an emphasis on coaching to the Tactical Sales Process, pipeline development and management.

The Senior RFM is responsible for delivery and fiduciary oversight of advisory-based services to philanthropic clients in collaboration with Philanthropic Specialists, Wealth Advisors, Investment Managers, Private Bankers, Financial Advisors and Centers of Influence. This role includes a heavy focus on leading philanthropic specialists in new business acquisition, collaborating with Investment & Fiduciary Centers in setting-up and administering Investment & Fiduciary accounts, retaining client relationships, and developing relationships to their fullest potential by cross-selling services of The Private Bank.

Position may sit at one of the following locations: San Francisco, Los Angeles, Dallas-Fort Worth, Houston, or Scottsdale.

Other locations may be considered dependent on the selected candidate.

REQUIRED QUALIFICATIONS

- 10+ years of wealth management experience
- 5+ years of experience in one or a combination of the following: investment management, trust, or investment planning
- 5+ years of management experience

DESIRED QUALIFICATIONS

Knowledge and understanding of wealth planning, trust, estate, fiduciary law, taxation, and investments

OTHER DESIRED QUALIFICATIONS

- Significant experience with philanthropic vehicles, such as endowments, planned gifts, private foundations, split-interest charitable trusts, and donor advised funds
- Significant experience with philanthropic business development
- Sales and client relationship management.
- 5+ years of trust, fiduciary and planning experience
- 3+ years philanthropic or nonprofit experience

Salary Information

To be determined

Disclaimer

All offers for employment with Wells Fargo are contingent upon the candidate having successfully completed a criminal background check. Wells Fargo will consider qualified candidates with criminal histories in a manner consistent with the requirements of applicable local, state and Federal law, including Section 19 of the Federal Deposit Insurance Act.

Relevant military experience is considered for veterans and transitioning service men and women.

Wells Fargo is an Affirmative Action and Equal Opportunity Employer, Minority/Female/Disabled/Veteran/Gender Identity/Sexual Orientation.

How external candidates apply:

Go to www.wellsfargo.com/careers

- *Click in the red box that says "**Start Your Future Now**" on "**Search Jobs**"*
- *Click on the blue box that says "**Search Jobs Now**"*
- *Click on "New job seekers — **Register now**"*
- *Enter your **User Name**, **Password, Name, Contact Information** and click "**Register**"*
- *Click on the small click on the left that say "**Submit/Update Profile**"*
- *Follow steps listed on the screen to complete your profile:*
    - *Copy and paste or attach a resume*
    - *Enter Employment Preferences: **IMPORTANT: If a job you are applying for requires a license or certificate, you must include it here (even if it is on your resume), or the system will decline your application.***
    - *Please enter your FULL (legal) name and address*
    - *Confirm your candidate profile status is "**Searchable**"*
- *To complete your profile, click "**Submit Profile**".*
- *Search the Job Opening ID of interest and APPLY – follow the 6 steps on the screen to complete the application and make sure you see a successful application notice.*