VECTOR WEALTH STRATEGIES'

VECTOR NEXT

TALENT DEVELOPMENT

FROM THE FRONT DESK TO THE C-SUITE

Associate Relationship Manager Responsibilities

Associate Relationship Managers' responsibility is to learn our craft and grow into the role of Lead Relationship Manager. They are constantly shadowing the team - scheduling client meetings and follow-up appointments, updating contact information and processing withdrawals, fielding phone calls, maintaining the office and supplies, updating the CRM, sending out cards and preparing documents for client meetings.

Lead Relationship Manager Responsibilities

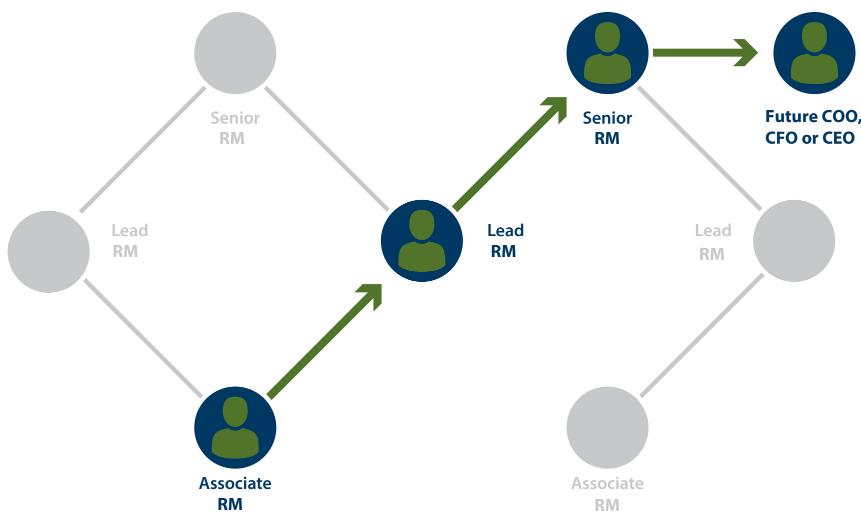
The Lead Relationship Managers schedule High Net-Worth client meetings, process more complex paperwork, and serve as utility players where needed. The team structure tends to encourage specialization among the Lead Relationship Managers - perhaps one focusing on marketing while the other focuses on new business. Lead Relationship Managers are encouraged to grow within their specialized area.

Technical Track: Subject Matter Expert

Some Lead RMs will pursue an area of expertise and achieve the title of Subject Matter Expert (SME) in a specific field or area of focus. This could be an area of expertise that includes marketing, human resources or simply the deep knowledge required to work with our most complex clients with the most unique tax situations and legal structures.

Management Track: Senior Relationship Manager

Other Lead RMs will desire a managerial development track and grow to lead their own team as a Senior Relationship Manager. Senior RMs work to oversee the day-to-day administration and operational functions of the company and staff. They work directly with the staff to delegate tasks and items for processing. They communicate goals from the Partners to the Relationship Manager team in order to implement processes. As the company grows, Senior Relationship Managers would be developing their people management skills and aligning themselves for internal promotion to future roles such as COO, CAO or CFO.



"We believe in finding team members, not hiring employees. This isn't a place where you just have a job, but it's an opportunity to build a career. You have value here and just like our investments for clients, we want to help you grow." - Jay Dryden, Managing Partner

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