



**BULL OAK**  
CAPITAL

858.999.3550

Careers@BullOakCapital.com

4747 Executive Dr, Ste 1010  
San Diego, CA 92121

# Lead Financial Advisor

Wealth management experience required.

## DO YOU

- Enjoy helping people achieve financial independence?
- Consider yourself detail-oriented?
- Love delivering high-level service?

**If so, then this is a great opportunity for you!**

## PAY + BENEFITS

**Competitive Base Pay  
+ Profit Sharing Pool  
+ Revenue Incentives**

*+ Health, Retirement, and More!*

## THE PERKS

Great people deserve great benefits. As a start, benefits include:

- 401(k) + Company Match
- Generous Health Insurance Coverage
- Paid Time Off & Paid Holidays
- Free Parking
- Free On-site Gym
- Free Coffee + Healthy Snacks



*Our office in La Jolla, CA*

## OVERVIEW

We are currently looking for a highly motivated, detailed-oriented, and experienced professional to join our firm in our San Diego office. Successful candidates will have a track record of success, exhibit excellent written, quantitative, verbal, and interpersonal skills and possess a growth mindset.

This job is best suited for an individual looking for upward mobility and a place where they can thrive for the long term. An existing book of business is not required, but a growth mindset is. Attention to detail, ability to solve problems, and excellent people skills are a must, along with a willingness to learn. Most importantly, we are looking for someone with a great attitude who will enjoy coming to work and serving clients as much as we do.

## RESPONSIBILITIES

- Own and drive the financial planning process, which includes walking our clients through our custom mind-mapping sessions, creating multiple planning scenarios, and delivering the results in a clear and consistent manner
- Identify planning opportunities for review with clients. Areas of emphasis include financial goals, estate planning, college planning, tax planning, insurance needs analysis, Social Security planning, and executive compensation planning
- Deliver plans to clients clearly and understandably. Responsibilities will include meeting preparation, financial plan construction, presentation of the plan to the client, meeting follow-up, and ongoing client service
- Become a subject matter expert, staying current on planning issues, communicating updates to staff, and contributing content to the firm's website (blog) and social media channels
- Contribute to the firm's strategic direction of its financial planning service offering
- Having fun and much more!

We do things differently here for the benefit of our clients, so we understand that adapting our methods and progressing along the learning curve will take time. However, the right candidate will succeed in this role, which may lead to equity ownership opportunities.

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## ABOUT BULL OAK CAPITAL

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We are a fast-growing boutique wealth management firm that treats our clients and team members like family. We are quickly making a name for ourselves within the San Diego region and are well-positioned to continue gaining market share.

While only seven years old, we currently service 85 households and manage \$115M.



A handwritten signature in black ink that reads "Ryan A. Hughes". The signature is fluid and cursive, written in a professional style.

**RYAN A. HUGHES, FOUNDER**

*Bull Oak Capital, LLC is an Equal Opportunity employer. This is an in-person position and not remote. No relocation assistance is offered for this position; candidates not residing in San Diego County, CA will be responsible for relocation at their own expense. Eligible candidates will be able to provide proof of eligibility to work in the United States without support; sponsorship is not available.*

*Our office is very busy, so please do NOT try to contact our team through any method other than submitting your resume and cover letter as described. All other attempts to reach our office will be ignored. Due to the financial nature of our work and the age of our clients, you will be required to pass a thorough criminal background check and a credit check.*

## QUALIFICATIONS

We want someone with the desire to do, and takes pride in doing, a good job. Our qualifications and requirements include:

- Attention to detail (without fail)
- Certified Financial Planner (CFP) and/or Chartered Financial Analyst (CFA) designations strongly preferred
- MBA or Master's in Finance
- Proficient in Microsoft Office (Word and Excel)
- Substantial knowledge of personal tax issues
- Excellent at financial planning, Social Security analysis, and tax projection software (E.g., Right Capital, eMoney, etc.)
- Professional, personable, discreet, efficient, and self-motivated
- Strong interpersonal skills and enjoys teamwork
- Experience presenting to clients in a competent, confident, persuasive, and empathetic manner. Able to formulate knowledgeable answers to difficult questions on the spot
- Strong organizational skills, multitasking, accuracy, service-minded, and meticulous adherence to doing the right thing
- Comfortable with thinking and performing outside of the box
- Strong written and verbal communications skills

## APPLICATION PROCESS

As a small-and-growing business, we can only afford to hire the best. If you think this job could be for you, please do the following:

1. Send an email to [Careers@BullOakCapital.com](mailto:Careers@BullOakCapital.com) that includes:
  1. Your resume in PDF format
  2. Your single-page PDF cover letter describing what makes you the best candidate and why you would like to join our firm
2. If we are thoroughly impressed with your cover letter and resume, we will schedule a brief phone interview to ask the first round of screening questions
3. If we think that you might be an excellent fit at our firm, we will invite you into the office for a formal interview
4. If the interview is a success, the last step will be to grab lunch or dinner with our founder, just to make sure we like each other before committing to working together

**Ultimately this process is designed so that once hired, our clients all remark "Where did you find this person? They are AMAZING!"**