VP, Head of Wealth Planning

CLARIEN

The VP, Head of Wealth Planning is a senior client-facing role responsible for helping high-net-worth clients and families make critical financial decisions and translate their goals into coordinated, actionable wealth strategies. The role combines financial planning, relationship management, business development and team leadership.

The successful candidate will build trusted relationships with clients and professional advisers, lead the development of a consistent family planning methodology and work with Private Banking, Investment Management, Trust, Lending and other Clarien businesses to deliver integrated advice across Bermuda and Cayman. The role focuses on clients with complex business, retirement, multigenerational or cross-border needs.

Key Responsibilities

- Lead comprehensive discovery conversations to understand each client's personal circumstances, business interests, family priorities, financial resources, goals and concerns.
- Develop and present coordinated financial plans covering investments, retirement, liquidity, lending, wealth transfer, succession, estate considerations, family governance and risk management.
- Advise business owners, entrepreneurs, executives, retirees and multigenerational families whose financial circumstances require coordinated specialist advice.
- Partner with Private Banking, Investment Management, Trust, Lending and external legal, tax and accounting advisers to deliver integrated solutions while maintaining clear responsibilities.
- Establish consistent standards, tools and processes for discovery, analysis, plan preparation, client presentation, implementation and ongoing monitoring.
- Generate new relationships and deepen existing ones through planning-led opportunities, client referrals and a strong network of professional intermediaries and centres of influence.
- Build financial-planning capability across Wealth Management, mentor future advisers and contribute to initiatives that strengthen Clarien's reputation as a sophisticated wealth-management adviser.

Qualifications and Experience

- Approximately 7+ years of relevant experience in wealth management, financial planning, private-client advisory or a related field.
- Demonstrated experience advising high-net-worth clients and families with complex financial circumstances.
- Strong knowledge of investment planning, retirement planning, cash-flow analysis, estate and wealth-transfer concepts, risk management and lending.
- CFP certification or a comparable recognised professional financial-planning designation is strongly preferred.
- Additional qualifications such as CFA, CPA, STEP, ChFC or other relevant wealth-management credentials would be advantageous.
- Demonstrated ability to build trusted relationships, develop business and help create a scalable advisory proposition.

Skills and Attributes

Exceptional discovery and listening skills; strong judgement; the ability to simplify complex financial matters; commercial instincts without compromising client or fiduciary interests; disciplined follow-through; confidence coordinating specialists; high standards of confidentiality and regulatory discipline; and an entrepreneurial approach to building new capabilities.

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience.

Please submit a detailed cover letter and resumé no later than NOvember 21, 2026 to:

Human Resources Department
25 Reid Street, Hamilton HM 11 P.O. Box HM 665, Hamilton HM CX
Email: jobs@clarienbank.com

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted. For information on how we process your personal information, please visit our website Privacy Statement at https://clarienbank.com/privacy-statement.

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