

## Human & Organizational Performance Manager

WealthVest Marketing—based in Bozeman, MT and San Francisco, CA—is a financial services marketing and distribution firm specializing in high-quality fixed and fixed index annuities from many high quality insurance companies. For the 10,000+ baby boomers who are retiring daily, retirement is top of mind. Americans have purchased \$24.2 trillion in retirement assets to insure their golden years, according to the ICI. WealthVest specializes in the marketing and distribution of these essential building blocks of retirement savings for financial professionals and their clients across the nation. As a member of our team, you will be empowered to be innovative, solutions-oriented and a driver of a culture of continuous improvement. Our goal is to enable you to reach your professional goals and be an integral part of a team of people driving to achieve departmental and overall organizational goals.

WealthVest is a high-energy, fast-paced, achievement-driven environment where every employee is critical to our growth and success. Our people are committed to and source pride from making our customers and partners, including our wholesalers, carriers and financial professionals, stronger at what they do. Our people thrive in a culture of accountability, challenge, teamwork and the opportunity to make an impact. Each team member is self-driven, proactive, respectful, and focused on what can happen and what is possible. WealthVest is committed to attracting, developing and rewarding team members who have the passion to make a significant contribution to the continued growth of our business. Through development of our people and ensuring the right people are in the right jobs, we can maximize the potential of every team member and deliver a best-in-class experience to our customers.

### Job Summary:

This position is responsible for delivering human resources strategies and services to build the organizational capability required to achieve business goals and imperatives. The Human & Organizational Performance Manager will be a critical member of the leadership team and report directly to WealthVest's owners. The position will provide thought leadership in the development of organizational capability through effective change management, talent management, employee relationship management and performance management across the organization working with department managers. This position will also execute day to day human resource functions working with the finance/accounting department and department managers and be a resource to managers and employees.

### Key Requirements, Skills & Experience

- 5+ years of HR experience building high performance teams
- Ability to develop /manage the execution of people-related projects and measure the business impact
- Passion for results; bias for action
- Motivated with strong work ethic and positive attitude
- Analytical problem solving skills and decision making ability
- Proactive and adaptable to new/unforeseen situations
- Strong verbal and written communication and interpersonal skills, strong attention to detail and a high degree of professionalism
- Ability to work in a fast-paced environment and manage several tasks simultaneously within deadlines
- Ability to work independently as well as with a team
- Planning, budgeting and organizational skills
- Basic knowledge of HR management practices such as workforce planning, employee engagement, succession management, performance management and retention.
- Undergraduate degree in HR or related curriculum, graduate degree a plus