

# STARMONT

## ASSET MANAGEMENT, LLC

September 18, 2006

In order to properly serve our growing Client base, Starmont Asset Management is seeking a senior person who has managed portfolios, advised Clients and managed Client relationships, to help us in these areas.

### Starmont Asset Management:

- A fee only wealth management firm with \$100 million + under management.
- 50+ Client relationships involving 100+ individuals and a few small businesses and non-profit organizations.
- Starmont does extensive financial planning but does not issue financial plans; rather the financial planning is reflected in the portfolios we construct and manage for Clients, and in the on-going advice we give Clients about their portfolio and other financial matters.
- We also work with our Clients' CPAs and estate planning lawyers in connection with tax planning, retirement planning, and estate planning.
- Clients' assets are a mix of stock and bond no-load mutual funds; individual bonds; legacy stocks; commercial real estate investments; and initial stock offerings of California community banks.
- Minimum portfolio requirement is \$1 million; average portfolio is \$2 million; Client net worth range from \$2-20 million; majority of Clients in their 50s and 60s—oldest in their 80s.
- Use Charles Schwab and Fidelity Investments as custodians for Clients' assets
- Founded by Harvey Rowen, former CEO of the Merrill Lynch Trust Company and former CEO of the Charles Schwab Trust Company.
- Named a top wealth management firm for the past five years by Wealth Manager Magazine
- Rapidly growing; recently named the 24<sup>th</sup> largest wealth management firm in the Bay Area by the San Francisco Business Times.

### Job Description:

- Located in Bishop Ranch 6, San Ramon, CA.
- Working with founder and President Harvey Rowen managing Client portfolios, advising Clients and managing Client relationships, supported by two staff people.
- 15-20 hours per week; independent contractor or employee; can grow to more hours as Starmont grows if desired.
- Compensation and benefits structured to meet the needs of the person.

### Ideal Candidate:

- Is an Adult
- Is honest and trustworthy with high ethical and moral standards and strong work habits
- Has worked managing portfolios for individuals, advising those individuals, and managing those relationships at a fee only RIA; an investment management firm; stock brokerage firm; trust company; or trust department of a bank
- Has passed the Series 7 and Series 65 Licenses.
- Is presently working full time but wants to work less hours; is presently working part-time and wants to continue to do so; or is presently not working at all but wants to work some hours during the week but less than full time at the present.

**Contact: Harvey Rowen, President - [hrowen@starmont.com](mailto:hrowen@starmont.com) - 925-648-4738**