BESPOKE™

We’re hiring!

Wealth Strategist Opening

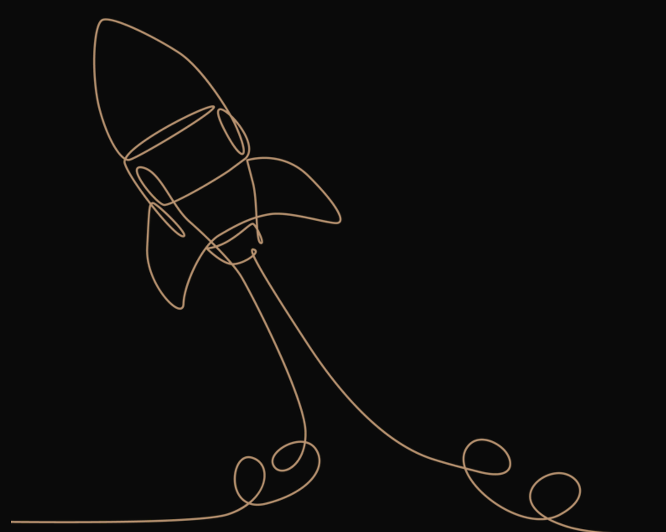
We’re hiring a Full-Time Wealth Strategist at Bespoke FO (Partially Remote).

Bespoke is growing, and we’re looking for a creative, curious, and service-driven **Wealth Strategist (WS)** to join our Wealth Strategy team. This is an exciting opportunity for someone with foundational experience in estate or tax planning who wants to deepen their expertise in a fast-evolving, high-touch family office environment–without the headaches of practicing law.

Creative Wealth Strategy is central to Bespoke’s value proposition. You’ll help design, implement, and manage the estate planning and tax-efficient structures through which our clients hold their wealth. You will develop, refine, and apply a broad understanding and application of U.S. domestic and offshore trusts, LLCs, and many other combinations of strategies.

In this active, client-facing role you will work closely with mentoring Senior Wealth Strategists, Client Relationship Managers, and third-party providers to create clarity, coordinate execution, and support long-term client success.

The successful candidate for the Wealth Strategist role will spend significant time in-office in Evergreen, Colorado. Relocation support is available.



What you'll do:

- Research tax, estate, and legacy planning strategies
- Prepare and deliver client-facing summaries, diagrams, and explanations
- Support Bespoke's Wealth Strategy team in delivering planning recommendations
- Help translate structures into actionable workflows for internal teams
- Manage coordination with attorneys, fiduciaries, CPAs, and other third parties

What we're looking for:

- Juris Doctor
- 0–5 years of estate planning, tax strategy, or related legal experience
- Strong communication skills and a passion to simplify complex topics
- High ownership, proactive problem-solving, and comfort working in a dynamic team environment
- Excellent organizational and project management abilities
- Curiosity, willingness to learn, and a desire to grow into a Senior Wealth Strategist

What we offer:

- Remote-friendly setup (U.S. based)
- High-trust, low-ego team
- An opportunity to express your creativity and curiosity in ways that benefit our amazing clients
- A chance to help shape something exceptional

How to apply:

Submit your resume and a short cover letter to careers@bespokegroup.io. We'll review applications on a rolling basis.

Know someone who fits? Send them our way or apply directly.