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# Example of Private Wealth Advisor Job Description

Our company is growing rapidly and is looking for a private wealth advisor. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for private wealth advisor

* Manages credit pipeline for all new and increased loan requests
* Acts in accordance with Bank's credit culture, policies and procedures
* Where possible, look to deepen and grow the bank’s share of wallet with clients, and actively look out for new client acquisition opportunities
* Disciplined Practice Management
* Typically focuses majority of time on core banking and lending activities (administrative, regulatory, transactional) while delivering a client experience that demonstrates understanding of the client's needs and proactive thinking about wealth management issues, opportunities and solutions
* Provides full balance sheet banking services and outstanding customer service to mass affluent customers and manages a portfolio of consumer account relationships
* Develops strong partnerships with internal business partners to serve customers' needs in other lines of business
* Delivers a holistic experience by specifically identifying and addressing customer priorities and appropriately engaging the subject matter experts
* Develops strong relationships with external centers of influences to source new opportunities by becoming involved in the community, and networking to identify and capitalize on new business development opportunities
* Support the Private Wealth Management business to provide leader and associate counsel related to associate relations activities

## Qualifications for private wealth advisor

* High school diploma or GED and 6 years of commercial banking/wealth management experience will also qualify
* Required license(s) or certification(s) ACTIVE FINRA Series 7, 63, and 65 (or Series 66 in place of Series 63 & 65)
* Strong knowledge of U.S. income and transfer tax laws
* Proven client management skills and effective but diplomatic communicator (both orally and in writing) who can positively engage and influence clients internal stakeholders
* 5+ years of experience in Private Banking or Financial Services industry
* College degree and seven (7) years line delivery banking experience preferably in lending, Trust investment or Wealth Management OR