Downloaded from <https://www.velvetjobs.com/job-descriptions/wealth-associate>

# Example of Wealth Associate Job Description

Our innovative and growing company is looking to fill the role of wealth associate. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for wealth associate

* Assist with all marketing efforts of the Wealth Management Division
* Assist Wealth Advisors/Senior Wealth Advisors to provide comprehensive wealth management and financial planning advice to clients
* Work closely with clients to understand their needs and help achieve their goals
* Work with other departments to ensure accuracy of client information and superior client service
* Assist Senior Wealth Advisor/Senior Portfolio Manager to provide comprehensive wealth management for high-net-worth clients
* Handles the preparation of valuation data
* Support a Wealth Management team of advisors serving affluent families and corporate retirement plans
* Support US Wealth external sales team in all sales related activities for the Head of US Wealth Sales and two other Regional Sales Directors
* Maintain financial advisor records in client relationship management system and help manage territory coverage
* Call financial advisors directly to help set up meetings, follow up, drive new sales leads, and close business

## Qualifications for wealth associate

* Minimum of 2 years working in a wealth management environment – demonstrated experience within financial planning, sales or client service is required
* Ability to comprehend all financial planning and communication documents
* Recognized as an expert in Wealth Planning in the industry
* Bachelors degree, preferably in Finance or equivalent experience
* Masters degree in Finance or related field a plus
* CFP certification preferred