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# Example of Wealth Management Advisor Job Description

Our company is looking to fill the role of wealth management advisor. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for wealth management advisor

* Develops new relationships through calling on targeted potential clients
* Serve as the lead wealth management advisor for a team helping affluent families identify and prioritize their goals & dreams
* Coordinate & work on multiple, concurrent client projects & complete assignments with minimum supervision
* Actively lead and participate in business development activities to identify, pursue & acquire new clients
* Must be able to develop / maintain cumulative IAS book of business of $ 9 - $ 20 mm over period of years
* Responsible to grow IAS book of business to meet and exceed annual goal levels
* Actively participate in client, prospect and COI meetings in the local market
* Provide investment analysis as needed or directed
* Initiate and participate in networking opportunities (both internal and external)
* Maintain client records and communication logs in accordance with firm policy, including appropriate use of CRM system, virtual filing system and hard copy filing

## Qualifications for wealth management advisor

* Stock option planning
* Gift Planning
* Experience with Advisory Platforms
* Candidates without existing licensing may be eligible for sponsorship per licensing guidelines
* FINRA Series 7, 63, 65 or 66 licenses, and applicable state insurance license
* Ability to effectively present investment strategies to clients and maintain a holistic approach to planning