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# Example of Wealth Management Associate Job Description

Our innovative and growing company is searching for experienced candidates for the position of wealth management 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 management associate

* Manage multiple training program development projects ranging up to high complexity/high impact
* Coordinate training sessions with internal business partners, includes details such as location, logistics, set-up, and materials
* Coaching of new hire trainees
* Responsible for learning@jpmc LMS administration including adding courses to database, managing attendance, performing evaluations
* Analyze data from a variety of sources and compile reports to track new hire onboarding and learner progress through their assigned training plan
* Examine course feedback and metrics to assess training participation, effectiveness, and ensure that appropriate outcomes/improvements have been attained
* Troubleshoot technical issues related to courses, sites, LMS, and telepresence units
* Ensuring all daily processes and SLAs are met within applicable timeframes
* Manage day to day BAU in line with team objectives and regulatory requirements
* Maintaining a culture of high performance and excellent service for both internal and external clients

## Qualifications for wealth management associate

* High-energy and hands-on individual with at least 3-4 years relevant work experience in Private Banking Risk Management or other Risk Management capacities, Compliance, Operations, or Audit
* Proficient in Microsoft Excel, using advanced formulas, vlookup, pivot tables
* 1-3 years of trust sales or trust relationship management experience
* Basic knowledge of personal financial planning, trust and investment products and services are required to perform primary duties
* The ability to successfully multitask, keeps organized, and responds to clients in a timely manner through written correspondence or via telephone
* Prior trade execution experience