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# Example of Wealth Manager Job Description

Our company is hiring for a wealth manager. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for wealth manager

* Maintains site and repository content for schools, presentations and training materials, ensuring continuing education credits are acquired, as required and accredited material is maintained
* Achievement of sales plan through maximized sales activities
* Sole management of the adviser and accountant cash deposit portfolio, responsibility for the uptake of the broader wealth products across the allocated portfolios
* Generate sales and growth of wealth products through effective relationship building across the broader adviser and accountant portfolio
* Support the national Wealth Sales Team with outbound cold calls, appointment setting and diary management
* Devise medium term investment strategy to meet the growth of assets under management within a timeframe of 6 to 18 months
* Identify, develop and source new relationships with investment clients through personal and client referrals, Barclays Group internal networks and fostering greater collaboration within group and WIMI business unit
* Possess good understanding of the definition of high risk occupation and high risk business AML
* Build enhanced procedures and controls within the Wealth Operations team to ensure consistently high quality services to the front office, clients and other business units
* Manage the relationship with internal/external counterparties such as transfer agencies to monitor the quality of services and ensure good market practices are offered and delivered timely and accurately

## Qualifications for wealth manager

* Build and maintain effective relationships with subject matter experts, business and technology partners with the aim of ensuring the project team draws on enterprise-wide expertise at the appropriate inflection points
* Access and SQL skills are preferred
* Licensed as a Supervisor, including but not limited to Branch Manager License, Option & Derivatives Supervisor, Registered Representative (RR) through IIROC
* Life Insurance license (LLQP)
* Strong people leader with an ability to build relationships impact & influence others
* Existing Series 7, 66 (or 63 and 65) and 24 and appropriate state life insurance licenses are highly preferred