Example of Private Wealth Advisor Job Description

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Our company is growing rapidly and is searching for experienced candidates for the position of private wealth advisor. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for private wealth advisor

- Maintain professional standards through an in-depth understanding of capital markets, financial and estate planning, banking, and industry trends that impact clients
- Acts as local expert for business solutions for wealth management teams, bringing appropriate lending and capital raising to the wealth management teams
- Serves as primary contact on credit portfolio and/or key/complex borrowing relationships
- Demonstrates credit/risk management discipline
- Writing content to be distributed to bankers, clients, prospects, or professional advisors, as appropriate
- Managing the production schedule of content, in coordination with the Wealth Advisory Practice Lead, Marketing, Advice Lab, and other internal constituents
- Update and revise as necessary the Wealth Advisory SharePoint website, to ensure content is current
- Assists in identifying the unique needs of existing and prospective clients
- Provides the highest level of service to our internal partners and ultimately the client
- Calls on clients with Private Wealth Management advisors to understand client needs

Qualifications for private wealth advisor

- Undergraduate degree with 3 years of sales and client management experience in the Wealth Services industry or degree and demonstrated ability to manage portfolio book of $1MM
- Basic credit knowledge to work with Credit Advisor(s) to deliver medium to complex credit solutions
- Excellent knowledge of all wealth management products and services
- Excellent sales, client management, and client service skills with the ability to sell a wide range of products and services
- Prior basic credit experience
- Minimum 5 years wealth management industry experience