Example of Wealth Associate Job Description

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

Responsibilities for wealth associate

- Researching and uncovering potential prospects
- Preparing meeting materials for prospective and current clients
- Coordination of sales activities around seminars, COI cultivation, community and bank sponsored events
- Scheduling meetings and calendar coordination
- Assisting with miscellaneous administrative matters including preparation of expense reports
- Creating and reviewing new account documentation
- Work collaboratively to identify new fee opportunities, and ensure that the sales process is proactive and timely
- Obtain strong understanding and knowledge of investment management, fiduciary and financial planning matters including life driven wealth solutions for high-net-worth individuals
- Help the Investment Advisor prepare for upcoming meetings with existing and potential clients
- Input and follow up on client orders (non-managed accounts)

Qualifications for wealth associate

- F.PI
- The ability to participate in group and committees within Research and with other aspects of the organization
- Requires state insurance licensing in appropriate jurisdictions (including state

- Experience with reading and interpreting insurance documents, wills, powers of attorney, shareholder's agreements, articles of incorporation including preparation of organizational charts
- Ability to work independently in a proactive manner within a Team