Example of Wealth Management Associate Job Description

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

- Participate in user acceptance testing for any regulatory related enhancement
- Partner with the global team and to provide MIS support for events and marketing team
- Any ad hoc projects and initiatives
- Ensure that the sales process is proactive and timely
- Research prospects through Factiva and Lexus Nexis
- Work with prospect database to implement proactive DRIP campaign to convert leads into prospects
- Set up files on new business prospects
- Communicate with internal partners on all aspects of a prospect/client relationship
- Develop in-depth knowledge of a full range of trust-oriented services
- Lead sales calls and present to COIs/prospects without the assistance

Qualifications for wealth management associate

- Track and monitor WM finance priorities
- Coordinate finance RCSA and periodic audits
- Enhance financial reporting used by Wealth Management Leadership
- Develop market and advisor level summary metric reporting
- Assist in strategic & ad-hoc projects for WM Group CEO