PRIVATE CLIENT ASSOCIATE

Job Description

We are looking for a Private Wealth Associate to work in a client facing role with a team of Financial Advisors for Bernstein Private Wealth Management. This role will require candidates to build upon their current skill set and will provide unparalleled immersion into all aspects of the wealth management industry. This is an exciting and challenging opportunity to partner with Financial Advisors to provide all aspects of client servicing including asset allocation advice, portfolio analytics, Trust & Estate Planning, Retirement Planning, and Core/Discretionary Planning for high net worth clients and prospects.

A Private Wealth Associate will:

• Partner with Financial Advisors to build their business and provide service and support functions such as portfolio analysis, account creation and maintenance, and client/prospect meeting preparation
• Partner with team members to accomplish a common goal of providing exceptional service
• Interact with clients to support all aspects of their servicing needs related to the management of their relationship
• Interact and network with senior professionals throughout the firm to fuel career success

Training Program

Private Wealth Associates will participate in a comprehensive and robust three-phase training program, spanning approximately three years. The Associate Development Program (ADP) will enable Associates to build a foundation of knowledge and develop skills needed to achieve client service excellence and fuel success as a financial professional. Curriculum will be delivered both in a formal classroom and on the job setting. Content can include:

• In-depth industry training, as well as on proprietary investments, services, policies and procedures
• Advanced training on trusts & estates, wealth planning analytics, investment management philosophies, and financial management strategies
• A focus on client service excellence, partnership and sales training in order to strengthen the client experience
• Behavioral training geared toward the development of communication, leadership, and other professional skills
• Career management, one-on-one coaching, and specialized skills training to achieve success beyond the Associate role
Job Qualifications

The ideal candidate should have a bachelor’s degree in business, finance or economics with excellence in academics and strong leadership experience. Candidates should either have two years of industry experience or be a recent college graduate with relevant internships.

We are looking for accomplished team players who seek a rigorous and challenging environment for their career development. Candidates should be client-focused and detail-oriented with a strong ability to multi-task and work under pressure in a fast paced atmosphere. They should also possess strong analytical and communication skills (both written and verbal) and an ability to build internal and external relationships. Proficiency in Word and Excel are required.

Bernstein Private Wealth Management will sponsor required series 7 license.