

## J.P. Morgan Wealth Management – Private Client Advisor - McKinney, TX (Eldorado and 75)

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Company: JPMorgan Chase & Co.

Location: McKinney

Category: business-and-financial-operations

At J.P. Morgan Chase, we have an enthusiasm for helping our clients, taking care of our employees, building relationships, and delivering extraordinary customer service while maintaining a strong commitment to diversity and inclusion. Using a broad investment product and thought leadership platform along with cutting edge digital technology, you will be front and center representing our brand and interacting with our clients to offer the best investment solutions to meet their financial needs.

As a Private Client Advisor in Chase Wealth Management, you will offer comprehensive financial planning and advice to individuals and families. Your expertise will support a wide range of clients, from those just starting to save to those with significant wealth. You provide an exceptional investor experience by offering advised solutions and Chase partner referrals that deepen client relationships. **Job responsibilities**

Champion and support your teammates' success and the goals of the bank, while fostering a culture of diversity

Build a book of business and deliver personalized investment solutions to your clients by relying on leadership and relationship-building skills. This will be done with a consistent focus on relationship management, not portfolio management

Demonstrate a deep understanding of financial markets and sound business judgement

Exhibit unwavering integrity that points toward doing right by clients at every opportunity

Demonstrate a passion for educating clients on the technology and channels available to them to better monitor, maintain, and handle their investments

Provide a holistic view of clients' needs and financial coaching beyond investments

Embrace digital innovations to help clients become more digitally confident and bank when, where, and how they want

### **Required qualifications, capabilities, and skills**

At least 2 years in a Financial Advisor role or equivalent financial services experience

Demonstrated success in client acquisition, cultivating and maintaining client relationships, and integrating with key partners

Demonstrated ability and commitment to goals-based planning and advice

A valid and active Series 7

A valid and active Series 66 (63/65) license is required or must be obtained within 60 days of starting in the role as a condition of employment

A valid and active Life, Health and Long Term Care Insurance license is required or must be obtained within 60 days of starting in the role as a condition of employment

### **Preferred qualifications, capabilities, and skills**

Certified Financial Planning (CFP) certification is preferred

Bachelor's degree preferred

INVESTMENT AND INSURANCE PRODUCTS ARE:

• NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, JPMORGAN CHASE BANK, . OR ANY OF ITS AFFILIATES • SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED

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