

J.P. Morgan Wealth Management- Private Client Investment Associate- New City, NY

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Company: JPMorgan Chase & Co.

Location: New City

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 Investment Associate in J.P. Morgan Wealth Management, you will provide client service, operational marketing and administrative support to Private Client Advisors within Wealth Management.

Job responsibilities

Support Advisors book of business including but not limited to facilitating accurately and timely operational requests such as account opening, money movement and investment trades

Aid the Advisors by building and maintaining client relationships through processing requests, resolving issues, and providing up-to-date information and assisting the Advisors with ongoing wealth planning for clients and referral source management and new lead generation

Assist in managing relationship and account reviews, promoting firm services to deepen client relationships; prepare timely and accurate performance reports

Actively engage in Risk Management; including Know Your Customer procedures, Account Reviews and Inquires

Support business unit operational procedures and compliance requirements (. completion of required operational forms and documentation)

Prioritize daily work, track progress for current work, and consistently meet deadlines

Maintain and foster team culture

Required qualifications, capabilities, and skills

A valid and active Series 7 license is required or may be obtained within a 60 day condition of employment

If you were registered after October 1, 2018 you must also have a valid and active Securities Industry Essential (SIE) exam

A valid and active Series 66 (63/65), and Life and Health Insurance license must be obtained within 60 days of starting in the role as a condition of employment

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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