

# United States Jobs Expertini®

## Wealth Management Associate

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Company: Equitable Advisors

Location: Santa Monica

Category: other-general

### Responsibilities

Our team of **wealth management associates** strive to provide knowledgeable, objective financial guidance and customized strategies to consumer segments that demand the highest quality service. You will have the opportunity to optimize your excellent interpersonal skills to perform face-to-face needs analysis with potential clients. You will be developing strategic and trusted long-term client relationships. In addition, you will have the opportunity to help make a positive impact on individuals' and businesses' futures by offering financial services and products that address their evolving financial needs throughout their lifetimes. These needs may include life insurance, investments, retirement and estate planning strategies, as well as executive benefits, business succession plans and employee benefits for your business clients.

Our dedicated management and support teams will help provide the guidance, tools and techniques for ongoing customer acquisition, personal growth and greater income potential. You will engage state of the art technology and internal systems and processes to service your clients. Training is a process not an event whereby our financial professionals, at every level of experience, build their careers. You will participate in national and local development programs and joint-work opportunities that provide comprehensive knowledge and skill training. We encourage and support the pursuit of professional designations that are recognized and respected by clients and others in the industry, including CFP®, Chartered

Financial Consultant and Chartered Life Underwriter.

## Qualifications

**Wealth management associates** may come from a variety of backgrounds, but they all share several important characteristics. They are results-driven, highly motivated professionals who have the desire to help others grow and protect their financial futures. Many of our qualified candidates are active in their local community, charitable or professional organizations, and have an established network of professional and personal contacts.

Specific qualifications for **wealth management associate** position include:

- o A four-year college degree *is preferred but not required*
- o You will be required to attain state life and health licenses, SIE, FINRA Series 7 and 66 exams (other designations a plus)
- o Results-driven, highly motivated, self-starter who possesses integrity, a strong work ethic and the desire to help others plan for and protect their financial futures
- o Team player who possesses excellent interpersonal skills and communication abilities, with a high degree of self-confidence
- o Ability to draw upon past/present experiences and acquaintances to develop markets and sustain long-term relationships

*Please visit us at ([www.Equitable.com](http://www.Equitable.com) or branch website)*

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Securities offered through Equitable Advisors, LLC (NY, NY (212) 314-4600), member FINRA, SIPC (Equitable Financial Advisors in MI & TN). Investment advisory products and services offered through Equitable Advisors, LLC, an SEC-registered investment advisor. Annuity and insurance products offered through Equitable Network, LLC. Equitable Advisors is an equal opportunity employer M/F/D/V. GE-3702620 (08/21) (Exp. 08/23)

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