Morgan Stanley

Wealth Management Associate - Job Description

POSITION SUMMARY:

The Wealth Management Associate is a client-facing role. Through a combination of client-management skills, planning, market, product knowledge, the Wealth Management Associate partners with team members to address the specific needs and service issues of 401(k) clients in order to cultivate existing client relationships.

DUTIES and RESPONSIBILITIES:

- Manages relationships with clients and proactively helps to resolve issues and concerns
- Coordinates resolution of complex issues/concerns received from the client with input from senior team members
- Identifies practice management opportunities through various firm channels
- Provides support on products and services
- Utilize financial planning tools to analyze complex financial information and lead client/prospect financial planning presentations in conjunction with senior team members
- Coordinates enrollment/education campaigns/meetings for 401(k) plan participants
- Utilizes knowledge, experience, and expertise to lead a comprehensive discovery analysis that identifies differentiating information and variables to be used in the financial planning process
- Participate in internal research projects and special client assignments as needed
- Develops customized presentation materials for existing clients
- Independently improves and streamlines the service model and operational procedures for the team
- Assist in business development efforts and from time to time participate in RFP responses

EDUCATION and EXPERIENCE

- College degree and 5+ years of relevant work experience
- Ideally a CFP, CFA, or CPA designation or progress toward
- Additional licenses may be required

KNOWLEDGE and SKILLS:

- Financial industry, tax, or financial planning knowledge preferred
- Excellent written and verbal communication skills with careful attention to detail
- Strong presentation skills in a large group setting
- Able to work independently, as well as in a group setting
- Advanced user of Excel and PowerPoint
- Self-motivated with a strong work ethic – able to work Monday – Friday. Client work at times could require more than 40 hours in a work week.
- Some travel through the Pacific Northwest.

Send your resume to Eric.Gefre@ms.com