Merrill Lynch, William Pastella: Looking for a Client Associate to join a growing four person financial advisory team in Syracuse.

Merrill Lynch Wealth Management is a leading provider of comprehensive wealth management and investment products and services for individuals, companies, and institutions. Merrill Lynch Wealth Management is one of the largest businesses of its kind in the world specializing in goals-based wealth management, including planning for retirement, education, legacy, and other life goals through investment advice and guidance.

Merrill Lynch's financial advisors help clients pursue the life they envision through a one-on-one relationship with an advisor committed to their needs. We believe trust comes from transparency. Our trusted financial advisors are equipped with access to the investment insights of Merrill Lynch coupled with the banking convenience of Bank of America.

Description

The Client Associate (CA) role is a sales support position, typically providing dedicated operational and sales support to multiple Financial Advisors (FA's). Incumbents may also on a regular basis support office initiatives, in addition to the businesses of particular FA's. For established clients, the CA will often serve as the most frequent point of contact with Merrill Lynch. Fully registered CA (Series 7 & 66 (63/65)).

Required Skills

- Minimum of 1+ years professional or relevant internship experience required
- Series 7 & 66 or 63/65 licenses preferred; if hired without licenses, depending on the needs of the business, you may be required to obtain registrations within a specified timeframe
- Knowledge of investment and banking products, policies & procedures
- Strong client service & technical skills (MS Word & Excel)
- Strong communication, time management and organizational skills

Desired Skills

- Undergraduate Degree

Email resume to:
William_pastella@ml.com