

Wealth Management – Private Bank SC Banker – Vice President

[J.P. Morgan Chase & Co.](#) is a leading global financial services firm with assets of more than \$2.7 trillion, over 240,000 employees and operations in over 60 countries. It operates across four business segments including Asset & Wealth Management, Corporate and Investment Banking, Commercial Banking and Consumer and Community Banking.

J.P. Morgan Asset & Wealth Management, is a global leader in investment and wealth management. Its clients include institutions, high-net-worth individuals and retail investors in every major market throughout the world. The division offers investment management across all major asset classes including equities, fixed income, alternatives, multi-asset and money market funds. For individual investors, the business also provides retirement products and services, brokerage and banking services including trusts and estates, loans, mortgages and deposits.

[J.P. Morgan Private Bank](#) advises the world's wealthiest families and helps them achieve their desired goals. Our teams of Advisors deliver advice, solutions and services across investments, wealth planning, credit and banking to help clients build, preserve and manage their wealth over time.

The U.S. Private Bank advises families across the U.S. through 45 offices and represents one of the largest growth opportunities for J.P. Morgan Chase & Co. In 2019, the U.S. Private Bank was recognized by Euromoney as the #1 Private Bank Overall in North America.

Our Team

As a Private Banker in the Private Bank, you are responsible for advising families on building, preserving and managing their wealth. You will use your knowledge of investments, financial planning, credit and banking to both advise current clients on all aspects of their balance sheet and drive new client acquisition. You will be part of a local team and supported by an institutional platform that has the resources, specialists and intellectual capital to help you advise clients on achieving their desired goals.

The best Private Bankers are self-starters with a proven track record of success. They are skilled problem solvers who offer specialized advice to clients. For those with an entrepreneurial spirit, a tenacity to succeed and a passion for delivering world class service to our clients, this role is an exciting opportunity to further build your career.

Our culture of performance, transparency and partnership is driven by objective, transparent goals and active teamwork to foster Advisor success. We are committed to helping you grow at all stages of your career.

Responsibilities

- Manage and maintain relationships with clients by earning trust, thoroughly understanding client needs, providing targeted advice, developing thoughtful solutions and delivering an exceptional client experience
- Drive business results and acquire new assets, both from existing client base and new client acquisition
- Advise clients on their overall balance sheet, including asset allocation, investment management, wealth planning, credit and banking needs
- Partner with internal specialists to provide interdisciplinary expertise to clients when needed
- Connect your clients across all lines of business of J.P. Morgan Chase & Co.
- Ensure that proposed solutions fulfill clients' needs and objectives in the short, medium and long term through a holistic goals based planning approach
- Strictly adhere to all risk and control policies, regulatory guidelines and security measures

Qualifications

- Six plus years of work experience in Private Banking or Financial Services
- Bachelor's Degree required; MBA, JD, CFA, or CFP preferred
- Series 7 & 63 licenses required for position; unlicensed candidates considered but required to obtain licenses within 90 days of start date
- Energetic and entrepreneurial business builder who thrives and excels in a competitive industry
- Proactive, takes initiative, and uses critical thinking to solve problems
- Focuses on the client experience and works tirelessly on the client's behalf
- Proven sales success and strong business acumen
- Dynamic and credible professional who communicates with clarity and has exceptional presentation skills
- Demonstrates strong organizational skills and applies a disciplined and organized approach throughout their business
- Strong community presence with an established network
- Experience or demonstrated understanding of investments, wealth planning, credit and banking concepts
- Experience with and in-depth knowledge of the equity and fixed income markets and alternative investments, including Hedge Funds, Private Equity and Real Estate

J.P. Morgan offers an exceptional benefits program and a highly competitive compensation package.

J.P. Morgan is an Equal Opportunity Employer.