**Wealth Management Client Associate**

[**Career Areas:**](https://degreed.com/explore/1265722)**Customer Service; Client Relationship and Advisor** | The Wealth Management Client Associate (WMCA) provides dedicated service, operational, and business growth support to Financial Advisors and Financial Advisor teams for Merrill investments and Bank of America banking account products and services. The WMCA serves as the point of contact for Wealth Management clients and plays a critical role in deepening client relationships. They have advanced knowledge of the financial industry and a significant understanding of Merrill investment products and Bank of America's deposit products and services. At the direction of the client, the WMCA executes trades on behalf of the Financial Advisor and their team, ensuring timely and exceptional client service delivery.

* Role Type : Individual Contributor
* License or Certification Required : Yes and No (see Other Details)
* Business or Support Team : Merrill Lynch Wealth Management
* Job Code(s) : CW010; CW011; CW018; CW019; CW020; CW021; CW022; CW023; CW024; CW025; CW026; CW027; CW029; CW032; CW035; CW036; CW037;CW044; CW045; CW046; CW047

Access additional career planning tools, search job openings, create job alerts and apply for a position.

[**myCareer**](https://mycareer.bankofamerica.com/us)

**What You'll Accomplish**

* Maintain and enhance relationships with existing clients.
* Support client acquisition activities like marketing and client events.
* Promote client retention and satisfaction through frequent proactive client contact and engagement.
* Provide daily service resolution for Wealth Management clients.
* Identify opportunities to further enhance a Financial Advisor team’s client service model.
* Assist with onboarding and mentoring of newer Wealth Management Client Associates and Registered Wealth Management Client Associates.

**Other Details**

* Full-time
* Overtime eligible
* Obtains or has SIE, Series 7, 63/65 or 66 when required
* Learn more about licensing requirements by visiting [Global Registration & Licensing (R&L)](http://flagscape.bankofamerica.com/portal/site/flagscape/menuitem.6e4435efecfe548f211649ede3cc5cba/?vgnextoid=2bc5fccd96f76510VgnVCM100000eec8ab9eRCRD&vgnextchannel=473d1f76a7a76510VgnVCM100000eec8ab9eRCRD&vgnextfmt=default)
* Opportunity to pursue [Professional Designations](http://resourcecentral.bankofamerica.com/Pages/Learning%20and%20Development/APDP_Home.aspx)

**Locations**

U.S. - Nationwide

*Completion of these recommendations assists in your development, but does not guarantee employment in the desired role.*