

## **J.P. Morgan Private Bank**

Inquiries can be sent to Lisa Geys at [lisa.w.geys@jpmorgan.com](mailto:lisa.w.geys@jpmorgan.com)

### **Banker Job Description**

J.P. Morgan Private Bank has been helping the world's wealthiest individuals, families, foundations, and endowments grow, manage, and sustain their wealth through personalized, comprehensive financial solutions for more than 160 years. J.P. Morgan is a global leader in asset and wealth management with assets under supervision of \$2.1 trillion and assets under management of \$1.4 trillion. With Private Bank advisors in 110 offices in 25 states and 20 countries, the Private Bank provides clients with a global perspective delivered through a local, dedicated team of specialists focused on fundamental wealth management disciplines, including investment management, wealth structuring, philanthropy, credit and banking.

### **Primary Function**

As a Banker with J.P. Morgan Private Bank, you will be accountable for identifying and developing client relationships within the high net worth or ultra high net worth market. As the brand ambassador, the Banker leads new client acquisition and retention through a broad knowledge of investments, banking, trust services, and financial planning. The Banker also leverages the specialists on their team in order to provide interdisciplinary expertise for our most complex clients. This role is primarily responsible for generating new clients and managing the ongoing client experience while engaging our resources to deliver a complete wealth management solution.

- Responsible for engaging in new business development each year (to include prospecting, development of external and internal referral sources, use of personal and professional contacts) to deliver J.P. Morgan Private Bank services to high net worth or ultra high net worth prospects and clients
- Remain ongoing relationship manager for specific portfolio of clients and ensure every client has a positive experience
- Perform role of chief client strategist by coordinating the team's ongoing communication with the client and orchestrating the execution of the client plan
- Exceed the expectations of J.P. Morgan Private Bank clients by displaying creativity in formulating integrated solutions through the use of a wide range of products and services (including investments, trust, banking, wealth transfer, etc.)
- Develop a perspective on specific client situations in order to proactively and effectively select and recommend solutions that could resolve their issues and meet their objectives

### **Qualifications**

- Demonstrated understanding of investments, banking and trust concepts including, but not limited to: asset allocation on structured portfolios, managed portfolios, brokerage accounts, portfolio reviews, deposit and loan solutions, basic trust and estate products and identification of wealth planning opportunities
- Measurable track record of successfully selling to high net worth and/or ultra high net worth clients
- Analytical ability in order to relate specific client asset situations to individual products
- Interactive skills in order to understand client needs and take action with the appropriate solutions
- Strong client relationship management and sales skills
- Continuous prospecting skills applied to COIs (centers of influence), associations, and community activities
- Experience profiling and formulating strategies for potential clients
- Demonstrated ability to close deals
- Impeccable interpersonal and organizational skills
- Strong leadership and management skills along with high level of self motivation
- Ability to work in a team based environment and assist in the development and retention of junior team members

### **Requirements**

- Seven plus years experience in private banking/wealth management developing business with high net worth and/or ultra high net worth individuals and families
- Bachelors degree required, MBA, JD, CFP, CFTA, CIMA or CFA strongly preferred
- Thorough knowledge of specific geographic market
- Established network of COIs (centers of influence) and sources for referrals
- Series 7 & 63 licenses required for position; however, unlicensed candidates considered but required to obtain licenses within 90 days of start date
- National Mortgage Licensing System (NMLS) registration under the terms of the Safe Act of 2008 is required. Upon active employment with J.P. Morgan, you will be required to either register via the NMLS registry or re-register and move your previous registration to J.P. Morgan.

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

J.P. Morgan is an Equal Opportunity and Affirmative Action Employer, M/F/D/V.