Client Proposal

Wells Fargo

Our next big investment is in you
Let's talk about taking your career to new heights

You have a proven track record of success but you're looking for more. More responsibility. More challenges. At Wells Fargo you'll find that opportunity. You'll join a team of people who are smart and share your values. You can enjoy a diverse career as you learn and grow your capabilities across our multiple lines of business. Our supportive environment can help you make a difference within the company and the communities we serve. Visit our career site at wellsfargo.com/careers and let's start a conversation about your future.

WM Investment Strategist (Lo) 3
Albuquerque, NM

Wealth and Investment Management (WIM) is one of the company's four main divisions. WIM businesses build enduring client relationships through sound, thoughtful and objective advice. We help our clients by developing individualized plans for everything from retirement goals to business succession planning, to family legacy intentions. Services include comprehensive planning and advice, investment management, brokerage, private banking, estate planning strategies, trust, insurance and both individual and institutional retirement.

Wealth Management (WM): Wealth Management business is a leading provider of financial services to high-net worth clients through Wells Fargo Private Bank, and to the affluent segment through partnerships between Wealth Brokerage Services and the Community Bank. In Wealth Management, clients are provided with a complete range of solutions to help them manage, preserve and transfer their wealth.

Investment Strategist provides clients a holistic investment approach to HNW clients and is delivered consistently through multiple channels. Develops business through sales/marketing while leveraging partnership opportunities throughout the firm; uses solid product knowledge and relationship skills to service clients; manages moderate and complex globally diversified investment portfolios; and manages moderate to large complex accounts independently. Responsibilities include: consulting the team to develop and recommend a client centric investment portfolio with full diversification using all of WMs investment solutions, services/products; recognizes financial/ non-financial asset opportunities to integrate into the overall investment plan for clients; advises and manages globally diverse investment and asset portfolios; utilizes the investment plan as a guide to a broader holistic investment methodology; ; develops and executes client investment strategy; with broad investment strategy authority and acting independently within established investment policy guidelines, provides advice to generate returns commensurate with an acceptable level of risk for the client; leverages various service mgmt. areas for investment implementation;; is the voice of WM investment philosophy/asset management capabilities; and disseminates investment management thought leadership information across their geography to clients. This LO position has customer contact and job duties which may include needs assessing and referring those customers interested in a dwelling secured product to a SAFE team member. This position includes assisting customers without taking an application and without offering or negotiating terms of a dwelling secured transaction. Individuals in a LO position also must meet the Loan Originator requirements under Regulation Z (LO) outlined in the job expectations below.

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Required Qualifications

- 6+ years of investment management experience

Desired Qualifications

- An active Chartered Financial Analyst (CFA) designation
- Wealth or investment management experience

Job Expectations

- Individuals in Loan Originator (LO) positions must meet the Consumer Financial Protection Bureau qualification requirements and comply with related Wells Fargo policies. The LO qualification requirements include meeting applicable financial responsibility, character, general financial fitness and criminal background standards. A current credit report will be used to assess your financial responsibility and credit fitness, however, a credit score is not included as part of the evaluation. Successful candidates must also meet ongoing regulatory requirements including additional screening, if necessary.

Visit **wellsfargo.com/careers** and search by **Job ID # 5280022** to apply.

Disclaimer

All offers for employment with Wells Fargo are contingent upon the candidate having successfully completed a criminal background check. Wells Fargo will consider qualified candidates with criminal histories in a manner consistent with the requirements of applicable local, state and Federal law, including Section 19 of the Federal Deposit Insurance Act.

Relevant military experience is considered for veterans and transitioning service men and women.
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