EagleForce Warrior
FOUNDATION

BEGIN YOUR CAREER IN FINANCIAL MANAGEMENT

CLIENT ASSOCIATES

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.

Specific responsibilities will include but not be limited to:

- Frequent client contact, typically by telephone, but also in-person and by email,
- Resolving client inquiries and complaints and determining which issues require immediate elevation to the Financial Advisor (FA) or a member of the branch management team,
- Account administration & maintenance,
- Prospect for new business in addition to prospecting existing clients for new product and service offerings,
- Determine which clients are most appropriate to contact for specific initiatives & service offerings,
- Place certain unsolicited orders for designated clients, under FA supervision, and
- Serve as the main point of contact for established clients.

Required Skills:

- Undergraduate degree preferred,
- Series 7 & 63/65 or 66 registration preferred; if hired without licenses, candidate will need to acquire,
- Knowledge of investment and banking products, policies & procedures is required,
- Strong client service & technical skills (MS Word & Excel),
- Strong communication, time management and organizational skills are required.
- Please be advised that under current company policy, Merrill Lynch does not sponsor a visa petition or other work authorization, nor will the company provide relocation assistance, for this position.

The EagleForce Warrior Foundation is a qualified 501 c3 (Federal Tax ID 82-4205664) charity organization.

Merrill Lynch
Bank of America Corporation