

Financial Advisor Associate

Job Summary:

A Financial Advisor Associate (FAA) should demonstrate commitment to delivering distinctive service. This position will be responsible for supporting Financial Advisors in documenting and processing loans, establishing, and servicing deposit relationships, and ensuring the accuracy of critical data to mitigate risk.

Job Duties and Responsibilities:

- Provide distinctive service to clients and prospects, in person and over the telephone. Respond to client inquiries and satisfactorily resolve client issues. Support firm-wide achievement of the three-ring standard (all phones answered by a live person within three rings). Prepare new and renewal loan documents. Create a superior client experience with accurate and timely processing of loan packages, while mitigating the firm's risk by following compliance, loan policies, legal and regulatory requirements. Close and disburse loan proceeds and process booking loans within 10 days. Assist Financial Advisors (FAs) in establishing new deposit relationships. Open depository accounts, verify client credentials, obtain all supporting documentation with zero CIP and deposit exceptions over 45 days. Effectively monitor portfolio risk in terms of delinquencies, maturities, and overdrafts. Ensure the accuracy of critical data (i.e., risk ratings, non-accruals, pricing, etc.) to minimize negative impact on the client or firm. Clear all controllable collateral exceptions within 90 days and all collateral exceptions within 180 days. Prepare for and attend weekly meetings with Financial Advisors and Credit Analysts to address monthly recurring tasks in a timely manner and resolve any pending items (past dues, exception items, maturing loans and deposits, etc.) with a focus on critical actions of supported advisors. Meet all the client's financial needs, both business and personal, and refer clients to other specialty areas such as Trust, Investments, Insurance, Treasury Management, etc. as appropriate. Assist other team members as needed to ensure delivery of distinctive service. Perform other related duties and responsibilities as assigned.

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