



# METROPOLITAN CAPITAL

## A UNIVERSAL BANK

### **Company**

Metropolitan Capital is a Universal Bank offering Private Banking & Wealth Consulting, Commercial Banking and Investment Banking services. Using a creative and customized process, we deliver highly integrated solutions for entrepreneurs, high net worth individuals, family offices and the small to medium-sized businesses that they own and operate.

### **Position**

Wealth Management Consultant – Full Time Position

### **Description**

Metropolitan Capital is a dynamic, fast-paced, team-oriented environment. We seek an energetic, self-motivated individual to join our Wealth Management team. The ideal candidate will have a minimum of 2-5 years advisory experience, an entrepreneurial attitude, a strong work ethic, the ability to execute within a team and the long-term aspiration to join a growing enterprise.

### **Skills Required**

- Strong client relationship management skills
- Strong interpersonal and communication skills
- Good business development and networking skills
- Ability to work collaboratively in a team environment
- Good Leadership and management skills
- Experienced Wealth Management and Advisory, including Financial Planning, professional
- Committed to ongoing continuing education to stay current on Wealth Management issues

### **Responsibilities**

- Work closely with our Private Capital Managers / Lending Officers in identifying and developing Wealth Consulting opportunities with our existing and prospective clients
- Oversee and manage the ongoing Wealth Consulting client relationship, conducting periodic reviews, client meetings
- Work closely in identifying and developing strong working relationships with external/ outsourced subject matter experts in Trust and Estates, Tax Accounting, Investment Management, Insurance, etc.
- Ensure all Wealth Consulting activities are in compliance with all Regulatory requirements
- Maintain appropriate skills and knowledge in order to provide specialist, professional independent financial advice in all relevant business areas

### **Qualifications**

- Undergraduate degree
- MBA, CFA or CFP®, preferred but not required

- 2-5 Years relevant experience

Please submit resumes and cover letters to:  
Chazle' Woodley, Human Capital Manager  
[cwoodley@metcapbank.com](mailto:cwoodley@metcapbank.com)

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