

# Summer Sales Associate

## Barclays Wealth Americas

### About Barclays Wealth

Barclays Wealth is dedicated to helping clients get the most from their wealth by acting as their wealth guide. We are part of the Barclays Group, one of the largest financial services companies in the world by market capitalization, with a history spanning more than 300 years. By working closely with other business units of the Group, Barclays Wealth is able to leverage synergies from client relationships and product capabilities. As a result, we aim to bring institutional disciplines and capabilities to the delivery of world class fiduciary, wealth structuring and trust services.

The Americas business of Barclays Wealth provides a full suite of investment services to high net worth individuals and businesses. Our private client platform leverages institutional quality third-party asset management and alternative investment management capabilities, top-ranked research-driven strategies, private trust company resources and global trading expertise.

For further information about Barclays Wealth, please visit our website [www.barclayswealth.com](http://www.barclayswealth.com).

### Purpose of role

The role of the Summer Sales Associate or Investment Representative (IR) is multi-faceted in nature. The IR's primary goal is to provide broad-based, holistic investment advice to his/her robust client base. Successful IRs build their business using a combination of analytical acumen and pure sales and networking skills. As the IR's client base grows, his/her responsibilities increasingly shift from asset-gathering to primarily managing client accounts and providing advice. IRs develop close relationships with their clients and help them grow their wealth over time.

### Benefits of the role at Barclays Wealth

- Entrepreneurial environment where you manage your own business within a world class financial services organization
- Ability to develop relationships with the most interesting people in the world (your clients)
- Variety of workflow
- Intimate involvement with all facets of the markets
- Interaction with other business units within the Barclays Group
- Direct access to senior management, research, strategy, and thought leaders within the firm
- Mentoring program that pairs each intern with both a Junior Mentor and Senior Advisor

### Role requirements

Some of the primary attributes of successful IRs include:

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We are an equal opportunity employer and we are opposed to discrimination on any grounds. If this position requires the person to be an Approved Person under the Financial Services and Markets Act 2000 (FSMA), disclosure of spent convictions within the meaning set out in the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 will be required.

### Professional/technical experience

- A deep understanding of the markets and macroeconomic trends
- Creativity and a focus on client service
- Exceptional sales skills
- Relationship-building skills combined with strong analytical capabilities

### Academic and professional qualifications

- Currently studying towards a Masters of Business Administration (between penultimate and final year of study)
- Exceptional academic track record
- Previous financial, sales, or entrepreneurial experience preferred

### Personal attributes

- Resilient, drive, and a hunger to succeed
- Entrepreneurial
- Independent thinkers
- Self-motivated

### Program Description

The Summer Program begins with three weeks of training in the Barclays Wealth New York office. The training agenda includes a wide spectrum of topics including learning the Barclays Wealth Americas platform and the sales process, meeting with senior management from all areas of the business, and participating in a variety of cultural activities in New York City. It is an intensive, interactive program, which will provide a foundation for you to learn about the role, our unique culture, and how to leverage the firm. Following this training, the typical summer experience includes several rotations with various IR teams in their respective regional office.

### Locations

Barclays Wealth Americas currently has summer opportunities in the following regional offices: Atlanta, Boston, Chicago, Dallas, Houston, Los Angeles, Miami, New York, Palm Beach, Philadelphia, San Francisco, and Washington DC.

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