The most successful people build their business around their passions

THE BERNSTEIN WEALTH ADVISOR

THE ROLE

The Wealth Advisor represents Bernstein Private Wealth Management within the communities where they work and reside. Bernstein PWM is widely recognized for its distinctive, distinguished platform—offering advice that truly makes a difference. Our Wealth Advisors build substantial, enduring practices around client segments for which they feel a genuine passion. Wealth Advisors serve as financial confidants, initially attracting clients to Bernstein and ultimately helping them meet increasingly complex challenges that extend well beyond managing wealth. As part of clients' inner circle, the Wealth Advisor intimately understands each client's values, lifestyle, and philanthropic goals. They connect clients to the firm's vast planning and investing expertise, in a way that is customized, enabling them to make better, more informed wealth decisions. In doing so, the Bernstein Wealth Advisor enhances clients' financial well-being while standing out among a crowded field.

THE IDEAL CANDIDATE

What makes Bernstein Advisors unique? Their backgrounds are as varied as our clients'. Our most successful advisors have largely oriented their practice around their passions such as working with entrepreneurs and business owners, nonprofit organizations, professional athletes and entertainers, global families, corporate executives, sophisticated investors, and multigenerational families. With diverse backgrounds, perspectives, and broad networks, the most effective Advisors embody the following characteristics:

- Entrepreneurial Spirit
- Intellectual Curiosity
- High Emotional Quotient ("EQ")
- Determination and Relentless Drive for Success
- Spirit of Generosity in Working With and Within Their Community
- Excellent Interpersonal and Communication Skills
- Structure and Discipline

. . .and the following qualifications:

- An existing network that can be continuously cultivated and expanded within the community
- Proven ability to build and maintain relationships with centers of influence such as attorneys, accountants, and business advisors
- Comfortable interacting with individuals of significant wealth
- Experience advising clients and being regarded as a trusted advisor, not only with financial decisions but for meaningful life and business decisions
- Trustworthiness and personal integrity that is beyond reproach
- Strong academic credentials
- A passion for investing and for people

OUR MARKET-LEADING TRAINING PROGRAM

We do not take our success for granted. The firm's culture is deeply rooted in lifelong learning, innovation, inclusion, and never settling for the status quo. Because our hiring profile is unique among our industry peers, we strive to recruit top decile professionals and provide them with the best-in-class training. Every Advisor, completes our immersive 13-week training program, which is designed to cover critical areas and provide the knowledge and skills necessary for a foundation of exponential success. The program is facilitated by the brightest minds at Bernstein including portfolio managers, wealth strategists, top senior Advisors, and senior management. Training doesn't stop there. We support our advisors with continuing education and ongoing professional development throughout their careers.

ABOUT BERNSTEIN

Bernstein is a unit of AllianceBernstein, which ranks among the largest investment managers in the world, with over $700 billion in assets under management. Since 1967, we have served solely as an investment manager, providing our diverse client base with an uncommon level of transparency. And while most experienced investment managers conduct research, the independent nature of ours—as well as the sheer breadth and scale of our effort—remains unmatched. And in an industry not typically known for innovation, we understand the world will look different in the next ten years compared to the decades past. We spend our R&D efforts ensuring our clients and their advisors will be well positioned for the future.

OUR BUSINESS– BERNSTEIN PRIVATE WEALTH MANAGEMENT

In a world where most investment managers look alike, Bernstein Private Wealth Management is a firm like no other. Bernstein's clients expect an experience that goes beyond cold figures. Other firms close deals. We open worlds, forge alliances, and strike new relationships. And we aim to help clients, causes, and communities envision—and achieve—a more prosperous, meaningful future.

WHAT WE STAND FOR

TRUSTWORTHINESS—We are accountable. Integrity, transparency, and reliability are core to our business model.

INNOVATION—We're always working for you, looking for new opportunities. Our high-conviction approach aims to deliver investment clarity and better outcomes.

TEAMWORK–We succeed together. An uncommonly collaborative culture helps us deliver exceptional personalized service.

EQUITY–We are committed to building a culture of diverse perspectives—one where all employees feel valued and are treated fairly.

COMMUNITY–We open doors. Leveraging our connections and mission-aligned resources to build communities of like-minded individuals.

RESPONSIBILITY–We are responsible citizens. We empower our people to make a positive impact for our clients, society, and the world around us.

Bernstein.com
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