UNC OVE R



*Job Description:*

*Client Relationship Manager*



***Job Title:*** Client Relationship Manager (CRM)

***Purpose Of Job:*** To support Financial Planners and ensure smooth delivery of excellent client service and client communication as per business processes.

***Reports To:*** Managing Director

***Key Responsibilities & Accountabilities:***

# Client servicing

* Provide friendly and professional point of contact for clients and enquiries (by phone, email and in person)
* Organise existing and prospective client meetings and actively manage FP’s diary and workload
* Prepare client documentation in advance of and following client meetings (as per business processes)
* Manage client service needs and client expectations to ensure client satisfaction
* Liaise with other team members on work progress per client account and keep clients informed (as per business process)
* Liaise with clients on any administration queries they may have
* Assist in client meetings when required
* Ensure that relevant service components (as per client agreement) are delivered throughout the year in a timely manner
* Open and maintain client files to the required compliance standards
* Ensure action points resulting from client meetings get diarised and dealt with

# Business Processing

* Check accuracy and completeness of new business documentation
* Ensure that all business applications are processed accurately and efficiently, in a compliant manner to the firms standards
* Ensure all supporting documentation is maintained as per company procedures
* Record fees
* Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
* Send letters of authority and gather accurate information as per advice process
* Obtain illustrations and application forms
* Produce portfolio valuations
* Ensure fund switches / rebalances are carried out accurately and within companytimescales

# Reviews

* Organise client review meetings as per Annual Review Process
* Prepare paperwork required for the reviews as per Annual Review Process
* Support FPs in the delivery of reviews
* Ensure implementation of agreed actions

# General administration

* Ensure back-office systems are kept up-to-date
* Filter FP’s general information, queries, phone calls and invitations
* Open, scan, log and allocate incoming post
* Other duties as directed by management

## Personal Specification:

***Job Title:*** Client Relationship Manager

***Criteria:*** E or D

## Knowledge

Microsoft Word, Excel and electronic diary management E

Financial Services back office systems D

Advanced Excel D

Knowledge of Financial Services Products E

Knowledge of cash flow planning tools D

## Skills

Interpersonal skills to develop and maintain client trust and inspire confidence E Excellent communicator (both verbal and written) E

Highly organised, methodical and disciplined E Shows initiative and takes personal responsibility for completing tasks E Able to work within defined business processes E

Adopts a positive attitude, willing to assist others when busy E

Able to work under pressure on occasions to achieve deadlines E

Attention to detail E

Ability to achieve agreed outcomes without supervision E

Excellent ability to prioritise and plan workload E Evidence of audio typing/correspondence raising, and diary management E

## Experience

At least 2 years experience working as an administrator D

Previous PA experience from within financial services industry D

At least 2 years working within a financial planning environment E

## Qualifications

Certificate in Financial Planning or equivalent D D= Desirable E= Essential