



# *Job Description: Client Relationship Manager*

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**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 company timescales

### **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

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## **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
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D= Desirable E= Essential