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: Operational Director/Practice Manager

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

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