



# Example of Client Services Associate Job Description

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Our innovative and growing company is searching for experienced candidates for the position of client services associate. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for client services associate

- New Project Setup ? track resource allocation and assist in on-boarding new team members
- Client Services provides support and guidance to internal and external customers in a dynamic, phone-based, team oriented customer service environment
- Respond to retail and professional clients' inquiries via inbound calls, email and on-line chat
- Assist clients with opening and funding accounts
- Show clients how to use different features of the Trader Workstation
- Explain margin requirements to clients
- Investigate trade issues and order executions
- Knowledge of securities regulations impact on customers
- Management of client related projects (dedicated service initiatives, custom configurations)
- Be proficient on all transactions for grade level 4

## Qualifications for client services associate

- Candidates for Senior positions must have a familiarity with web technologies, desktop publishing software, database and network environments, translation memory tools

- RG146 – willingness to study toward and attain qualification
- Intermediate Proficiency with HTML
- Intermediate Proficiency in JavaScript and SQL a plus
- Intermediate proficiency with Microsoft Excel for managing data and performing quantitative analysis