



Example of Client Services Associate Job Description

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Our growing company is hiring for a client services associate. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for client services associate

- Serve as the primary point of contact for client contacts
- Supporting the sales team to win new client relationships by attending sales meetings, participating in sales calls and preparing RFP responses and cost estimates
- Own the preparation of Client material prospecting packs, portfolio review books and ad-hoc presentations
- Own the client reporting timetable
- Support and develop our statistical data to support MIS reporting
- Fully cooperate with our business functions across the firm Operations, Compliance, Legal, Trading, PM etc and our outsourced functions
- Support client service managers and the institutional sales & marketing leadership through involvement with a selected group of client relationships
- Assist with the set-up of new client accounts, including the client suitability checks and with the collection of anti-money laundering documentation
- Assist with the completion of performance commentaries
- Assist team members as needed in successful completion of Alternatives Client Services process improvement initiatives

Qualifications for client services associate

- At least 3 years' experience in management in a billing and accounts receivable required
- Knowledge and ability to understand global/national health care issues
- Experience in the art of negotiating

- Experience working with multiple clients, complex client relationships and/or high volume
- Working with clients directly on all pre-production preparation activates