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# Example of Client Advisor Job Description

Our growing company is looking for a client advisor. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client advisor

* Focus on education and demonstration, leverage technology to deliver a memorable client experience, drive solutions and retain business
* Prepare initial and annual trust reviews
* Process gifts to charity and family
* Producing all renewal communications to the client including
* Document written and verbal communication with clients and their advisors in Salesforce
* Input client information in Salesforce and update as needed
* Forecast monthly and quarterly client renewals and identify key accounts in order to up-sell and retain client base
* Serve as an expert in learning and talent analytics and the Metrics that Matter software
* Develop strong consultative relationships with clients, including understanding their business objectives and identifying how Metrics That Matter can meet their needs
* Communicate with clients and their advisors regularly

## Qualifications for client advisor

* 1-3 years of Sales/Marketing experience would be preferred
* Exceptional communication (verbal and written) and organizational skills
* General knowledge of the IT industry and leading products strongly preferred
* Ability to maintain a positive attitude and 'get it done' mentality at all times
* Ability to work in a self-directed, fast-paced entrepreneurial environment
* Undergraduate degree with 7+ years of lending and relationship management experience