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# Example of Client Advisor Job Description

Our company is growing rapidly and is looking for a client advisor. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for client advisor

* Attend client meetings, document issues discussed and coordinate follow up
* Oversee preparation of client meeting materials
* Document client information and communications in Salesforce
* Work directly with Legal Spend Management customers, such as insurance carriers, corporate legal departments and law firms
* Lead new business initiatives & defensives including referral generation
* Knowledge of broker and insurance industry with enterprise (1,000+ lives) market expertise
* Expert-level employee benefits knowledge, specifically life and ancillary benefits
* Manage risks by adhering to compliance routines, processes, and controls to protect client and shareholder interests while completing transaction
* Proactively assists Client Executives in most aspects of policy management, proposal preparation and presentation creation to better serve clients
* Prepares and issues invoices to clients and identifies and resolves billing problems to ensure accurate records are delivered to clients and maintained internally

## Qualifications for client advisor

* Proficient in Microsoft Office Suite - Excel, Outlook, PowerPoint, Word
* Demonstrates basic to solid investment knowledge and the ability to deliver basic Financial Planning via Financial Profiles Forecaster software
* Has a basic knowledge of all Wealth management products and services, strong consultative and client management skills with the ability to sell a wide range of products and services and very strong Client Service Skills
* Superior knowledge of all wealth management products and services
* Bachelors degree in a relevant field (Business Administration, Finance, Economics, Law, Taxation) required
* Experience preferred 1-3 years of experience required