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# Example of Client Advisor Job Description

Our growing company is searching for experienced candidates for the position of client advisor. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client advisor

* Monitors the maintenance of proper records for reporting and audit purposes and processes insurance and claims details into the database
* Responds directly to simple and moderately difficult client questions and requests, and solicits assistance from Client Executives as needed
* Proactively assists Broker in most aspects of policy management, proposal preparation and presentation creation to better serve clients
* Builds and maintains ongoing relationships with small clients and team colleagues to deliver services both internally, and in some cases, externally
* Provides assistance to Broker regarding coverage questions and program adjustments
* May demonstrate the ability to enter new bonds, upload documents, client demographics ,process renewals, , under some supervision
* Prepare and submit accurate market presentations and slips in consultation with the Client Executive and Market Placement Teams
* Experience in cultivating relationships with employers, brokers, and carriers
* Ability to communicate and negotiate with C-Level management
* Ability to maintain high degree of Salesforce discipline

## Qualifications for client advisor

* Ideally have technical skills in some of the following insurance lines – Directors & Officers Liability, Professional Indemnity, Cyber
* Is an expert user of the company-sanctioned Internet and e-mail, word processing and spreadsheet software
* 5-7 years experience in Private Banking/Wealth Management
* Minimum grade B in GCSE (or equivalent) English & Maths (A levels or equivalent preferred)
* ACII qualified (or working towards) preferred
* Competent in Microsoft Office and all relevant business applications