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# Example of Client Advisor Job Description

Our company is looking to fill the role of client advisor. 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 advisor

* Interact with insurers to ensure proper documentation such as local policies and invoices are produced accurately and in a timely manner
* Ability to negotiate commission agreements and technology subsidy arrangements
* Review bonds wordings and provide clear verbal and written guidance to clients regarding the suitability of the bond wording submitted
* Draft bond wordings and arrange for bonds to be executed by Surety and delivered to the client
* Review outstanding client payments and where appropriate chase for payment
* Process new and additional premium invoices
* Obtain and review cancellation documentation from clients and process with relevant Surety
* Production of monthly client reports in Excel
* Ensure Bond facility records are kept up to date on the Surety database
* Assist with general correspondence and administrative support including filing and file management

## Qualifications for client advisor

* Numerical and analytical skills with intermediate use of MS-Excel preferred
* Has extensive knowledge of in-house, proprietary financial and sales-reporting systems, office databases and company-sanctioned presentation software
* 3-5 years post-undergraduate work experience, with experience at a leading strategy or management consulting firm preferred
* Ability to implement and troubleshoot changes and modifications
* Ability to build relationships with client teams and key stakeholders
* Accountability for tasks being performed and completed on schedule