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# Example of Client Advisor Job Description

Our innovative and growing company is looking to fill the role of client advisor. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client advisor

* Maintains high standards of sales practices and service
* Executes cross selling strategies between Popular Securities, Popular One and/or Banco Popular de Puerto Rico
* Serves as a Broker of the Day, providing service to Popular Securities customers who need to buy or sell an investment product and their Financial Consultant/Advisor or Registered Sales Assistant is not available
* Supports the Senior Banking Consultants of BPPR Premium Banking Services Group that serves the Mass Affluent segment
* Works during the stock market open hours, even if is a holiday in Puerto Rico
* Build a book of business achieving growth targets by meeting client’s investment, trust, deposit and lending needs
* Utilize goal based planning to meet client needs
* Maintain an organized and consistent calling effort to build a strong network, develop a pipeline of opportunities, and generate client acquisition and expansion
* Assess and determine client’s trust and investment goals, presents proposals, and closes managed investment solutions
* Partner with Commercial, Mortgage and SBA teammates to develop relationships and client introductions

## Qualifications for client advisor

* Must be driven to achieve goals and career success
* One year of related sales experience and/or training
* Manufacturer certifications as required
* Ability to work retail hours of dealership
* Cert CII qualified (or equivalent) Working towards ACII desirable
* Competitive salary that is internally equitable and externally competitive