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# Example of Client Onboarding Analyst Job Description

Our company is growing rapidly and is searching for experienced candidates for the position of client onboarding analyst. 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 onboarding analyst

* Work closely with PWM teams to ensure all client documents are correct and sent to the client in a timely manner
* Resolve issues through coordination with PWM Teams, PWM Compliance, PWM Legal and Anti Money Laundering
* Point of contact within Operations responsible for account opening and relationship with different business units and investment advisors
* Understand industry regulations and internal policies
* Support the vetting / negotiations of all contractual, guideline and supplemental agreements that have an operational input or impact with both internal and external parties
* Ensure that any and all agreements are finalized and dully executed
* Develop relationships with client contact (internal & external) and relevant third parties
* Coordinate customers/clients onboardings and approvals across multiple functions / units - Front Office, Compliance, AML, Middle Office, Operations, Legal and Tax, amongst others - all in a high pressure / time-sensitive environment
* Provide guidance to other COG Analysts
* Review corporate documentation, legal documents, tax forms and other account opening paperwork/information for completeness and accuracy

## Qualifications for client onboarding analyst

* Experience in client servicing preferably with knowledge in banking and market products
* Experience in AML, KYC or Client Due Diligence is an advantage
* Able to work as part of a team and independently under minimal supervision
* Maintain strong working relationships and liaise with internal and external counterparts including Clients, Sales, Trading, Legal, and Compliance
* The individual will be responsible for handling onboarding process
* Bachelor’s degree minimum Excellent written and oral communication skills