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# Example of Client Relations Associate Job Description

Our growing company is looking for a client relations associate. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client relations associate

* Execute on requests from senior marketers (platform specialists / client portfolio managers) and collaborate with portfolio managers on outstanding issues
* Act as central point of contact for 3rd party print vendors employed in the reporting process
* Participate in Investment Committee meetings, business planning, budget review, investment pipeline discussions
* Manage portfolio management and sales-oriented toolkits
* Work with our finance team to complete fund level and client/consultant specific analysis, , cash flow analysis, distributable cash flow calculations, cost basis analysis, IRR analysis
* Manage and execute the monthly and quarterly trade process
* Provide exemplary service in combination with sound judgment, empathy, patience and balanced decision making skills, to resolve customer concerns quickly
* Field customer contacts to the corporate office via phone, email, social media, and our Guest Voice portal and respond to all customer needs in a timely manner, within brand and departmental guidelines
* Support the creation and update of all marketing collateral including marketing pitch book, investor welcome packages, product profiles and teasers, ad hoc materials
* Respond to requests from senior marketers (product specialists), portfolio managers and the investment team

## Qualifications for client relations associate

* Work with product specialists to complete and/or review requests for proposal (RFPs), requests for information (RFIs), due diligence questionnaires(DDQ), quarterly/monthly client/consultant questionnaires and ad hoc requests
* Assist with all client service duties associated with account maintenance
* Work with our finance team to complete fund-level and client/consultant specific analysis (e.g., cash flow analysis, cost basis analysis, IRR analysis, investment experience attribution)
* Support internal marketing efforts to JPMAM and GRA sales force - providing client relations and sales support
* Verify all historical information (performance, characteristics, personnel, assets) residing on databases including product and firm specific narratives
* Primary point of contact for firm and strategy level asset requests