Downloaded from <https://www.velvetjobs.com/job-descriptions/client-relations-associate>

# Example of Client Relations Associate Job Description

Our growing company is searching for experienced candidates for the position of client relations associate. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for client relations associate

* Identifying, assessing, managing and perhaps escalating high-level client requests where business may be at risk
* Partnering with the rest of the Client Service team to proactively think of ways that that the company an enhance the overall client experience, increase efficiencies and provide best in class client service
* Communicate with customers appropriately
* Lead the organization of conferences and other special events
* Manage the production of investor surveys, analytics and outreach
* Oversee the production and distribution of quarterly fund-level reports, such as Snapshots and quarterly/annual reports
* Oversee client-specific reporting such as distribution notices, investor statements
* Respond to investor queries and lead client service duties associated with account maintenance
* Work with the infrastructure finance team to complete fund-level and client/consultant specific analysis
* Work with the infrastructure product development team on any compliance related activities

## Qualifications for client relations associate

* Knowledge of infrastructure and related industries experience would be a plus
* Ability to handle and prioritize multiple tasks with a short deadline
* Mature and flexible attitude
* Ability to interact appropriately with investment professionals
* Good judgment and interpersonal skills
* Energetic, with strong interest in investment business