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# Example of Client Relations Associate Job Description

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

## Responsibilities for client relations associate

* Receives customer requests by telephone, e-mail, chat and web
* Answers to customers on product and service related questions
* Resolves level 2 product or service problems by clarifying the customer's complaint
* Preparing document requests, due diligence questionnaires and presentations
* Ensuring best-in-class accurate and timely support when booking, reconciling and summarizing capital activity (i.e., subscriptions, redemptions, transfers) liaising across internal teams and External Administrators
* Collaborating closely with various teams throughout the organization, including accounting, engineering, risk, legal and compliance to assist with the development of client materials and analytics
* Assisting with a variety of bespoke projects and process improvement initiatives
* Understanding our firm’s mission and values product offerings in the Institutional and Retail market
* Develop and maintain database of all marketing and presentation materials
* Provide data and input for Service Level Agreement (SLA) Penalty claim discussions

## Qualifications for client relations associate

* Previous experience working with open or closed-end funds would be a plus
* Team player with good detail and follow-up skills
* Energetic and proactive in taking on additional responsibilities and projects
* College degree (BA/BS) required, preferably with a Business/Finance background
* Fluency in both English and Cantonese (spoken and written)
* Minimum of 5-7 years’ experience with marketing, investor relations, operations and/or management