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# Example of Client Relationship Associate Job Description

Our company is growing rapidly and is looking to fill the role of client relationship associate. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for client relationship associate

* Collaborate with other lines of business of Mercer HK, including Health (employee benefits and broking, etc) and Career (talents and rewards strategies), to promote well rounded solutions across Health, Wealth and Career
* Lead new account onboarding and ongoing account maintenance (opening new accounts, managing transactions, address changes)
* Work closely with senior team members to manage, enhance, develop and retain existing client relationships and ensure all client needs are met
* Work with senior team members to develop and execute a strategic plan for each client, which outlines a service plan and specific deliverables
* Build and develop relationships with existing institutional clients with the goal to independently interact and manage own relationships
* Ensure all reoccurring and bespoke client requests, including all reporting deliverables, are met on a timely basis
* Coordinate ongoing client account maintenance items
* Partner with Portfolio / Product Manager(s) to prepare and review materials for portfolio review meetings
* Build and manage an industry knowledge base by researching and staying current on industry publications and newspapers, client web sites, conference materials, consultant and other databases
* Coordinate gifting activities including processing cash and in-kind gifts

## Qualifications for client relationship associate

* Ability to successfully direct multiple projects and ensure quality deliverables
* Intellectual capacity and curiosity to enable structured and self directed learning
* Proven ability in relationship management
* Strong multi-tasking skills and time management are essential
* Preference for 3-5 years of experience in a client-facing role (preferably at an asset manager)
* Cross product knowledge (FX, Equities, Fixed Income, and Derivatives) is an advantage