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# Example of Client Relationship Management Job Description

Our growing company is looking to fill the role of client relationship management. 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 management

* Help coordinate life-cycle events of client accounts, including implementation of new business, account restructures and terminations
* Resolution of escalated client service queries and issues, ensure in-time, appropriate error/incident escalation and resolution
* Identify opportunities for client service improvement and coordinate with all areas impacted to effect the change
* Providing process exceptions and authority on the management company’s behalf
* Partnership with JPMAM Vendor Management, attendance at monthly service review meetings
* Representation of Client Service TPA within AM forums
* Participating in client meetings and events
* Assisting with prospecting and business expansion via cold calling and arranging and attending introductory calls and meetings and arranging seminars and conferences
* Specific responsibility for NSW based organisations
* Help coordinate life-cycle events of separate accounts, including implementation of new business, account restructures and terminations

## Qualifications for client relationship management

* FINRA Series 7, 66 (or equivalent 63 & 65) or passage within 120 days of starting role
* Industry certifications such as CFP, ChFC, CLU, are highly desired
* Responsibility for the articulation of JPMAM’s strategic aims to grow our market share with the UK’s leading N&Ns
* Responsible for managing JPMAM’s Head Office and Fund panel relationships with the leading N&Ns
* Maximize sales opportunity by nurturing relationships with the key N&Ns, ensuring JPM Funds are on fund Panel buy lists
* Negotiate strategic marketing partnerships demonstrating clear business case and tracking mechanisms for ROI