Downloaded from <https://www.velvetjobs.com/job-descriptions/client-service-account-manager>

# Example of Client Service Account Manager Job Description

Our company is growing rapidly and is looking for a client service account manager. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for client service account manager

* Work closely with sales on renewals and upselling, but incumbents do not have specific sales goal accountability or primary responsibility to close sales
* Responsible for specific Account Management Performance Standards
* Manage a wide range of transactions for international and domestic clients, varying in complexity
* Identify, receive, transfer, invest and disburse trust and agency funds pursuant to the terms of the legal contracts (investment using internal and external investment firms, money movement via Fed Wires, Swift and ACH
* Represent UHC operations in communication to clients related to new programs and enhancements to existing programs
* Support Open Enrollment
* Actively works with peers to help guide the team toward strategic goals the mission of Optum
* Responsible for queries from existing clients, coordinate with internal teams, monitoring progress to resolution and ensuring that responses are timely and of a high quality
* Analyze payment and associated activities in order to identify efficiencies
* Act as the primary and trusted contact for clients across the Corporate, MNC and Financial Institutions industries

## Qualifications for client service account manager

* 3 to 5 years experience at an asset management firm
* Previous experience with drafting or revising Health Benefit-related documents
* Legal and/or Document Issuance experience
* Smooth On-boarding process for allocated client base in close co-operation with Sales and Operations including Retrocessions
* Handling client queries & phone trading within agreed deadlines and service levels
* Provide the essential link between sales and operations take end-to-end ownership of client related matters where appropriate