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# Example of Client Service Associate Job Description

Our growing company is looking to fill the role of client service associate. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client service associate

* Perform oversight of all internal and external deliverables
* Serve as point of escalation for all operational risk exposures
* Support all operational, client servicing and financial reporting functions within alternative investments
* Maintain and post client valuations
* Coordinate the subscription, redemption, and client billing process
* Range of administrative and client service duties to support our clients in relation to their financial planning needs
* And educating clients with new applications, procedures, systems and initiatives
* And maintaining client files including assisting with annual client reviews and compliance documentation
* Process various types of monetary transactions on a day to day basis
* Manage review meeting items

## Qualifications for client service associate

* Assist with company receptionist duties on a regular basis daily back up call recipient
* Assisting in client meetings, pitch presentation, marketing materials, questionnaires and reporting
* Participating in all aspects and stages of the client experience
* Polite and clear telephone manner
* Comfortable with common technology
* Warm, friendly, and mature nature