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

# Example of Client Service Manager Job Description

Our company is growing rapidly and is looking to fill the role of client service manager. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client service manager

* Ensure that all Analysts are properly trained and contributing to training in their product areas
* Provide Analysts with opportunities for continuous learning and development
* Serve as a key client resource for a broad range of non-investment specific issues, such as shopping for loans, personal insurance
* Provide basic financial and investment education to less sophisticated clients
* With assistance of assigned investment professional, review initial investments for new accounts ongoing investments for existing accounts
* Working with the Wealth Management team to analyze client needs and objectives, identify appropriate services, and implement programs to help achieve their goals
* Implementing and monitoring investment portfolios as directed by the team
* Conducting transactions on behalf of clients
* Collecting, processing, and analyzing data needed to complete the client’s financial plan
* Performing case analysis and preparing plan recommendations for advisors’ review

## Qualifications for client service manager

* Ability to prioritize time-sensitive work
* Self-motivated to resolve complex issues and establish systems and processes
* Knowledge of and ability to explain KYC, ATF and/or AML regulations, requirements and procedures
* Self-motivated, able to work independently, part of a team - working well with other team members and keeping all relevant individuals, including management, up to date in a timely manner
* Research and analytical ability to review information and draw appropriate conclusions
* Comfort with DoubleClick / DART / Ad serving rich media vendors Pointroll