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# Example of Client Service Rep Job Description

Our innovative and growing company is hiring for a client service rep. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for client service rep

* Routine business account servicing including
* Possess customer service skills and effectively communicate information, both orally and in written form
* Acts as liaison between the broker dealer’s clearing firms, advisory sponsors, and direct check and application vendors
* Processes client maintenance requests such as name, address, or beneficiary changes, and account documentation updates
* Determines corrective action for rapid problem resolution
* Monitors and controls firm’s AML (Anti-money Laundering) and works to efficiently identify and resolve issues
* Prioritizes personal work assignments in a fast paced, time-sensitive environment
* Reviews and follows up on previously submitted business to ensure successful completion in a timely manner
* Performs various other tasks and responsibilities inherent to the broker-dealer
* Providing training when necessary

## Qualifications for client service rep

* Must possess skills in time and project management
* Must have effective organization, negotiation and conflict resolution skills
* Must be able to work at a face pace under strict deadlines
* Ability to work with a high level of accuracy and attention to detail
* Must be able to work independently and utilize sound judgment
* Requires computer experience in spreadsheets, word-processing and data/order entry applications