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# Example of Financial Account Job Description

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

## Responsibilities for financial account

* Coordinate Watson account planning to include the Client Executive, Architect, Global Business Services (GBS) leader, other Watson individuals or relevant brands involved with the account
* Collaborate with the entire U.S. Financial Intermediaries team to achieve individual and team goals
* Maintain prospect and client pipeline activity in firm-wide CRM (Salesforce)
* Collaborate with client team members on to define growth strategies and provide analytic support to corporate initiatives
* Maintain regular interaction to proactively identify new savings or other opportunities for all assigned accounts
* Conduct thorough and detailed analysis using the customer data in order to interpret data through financial modeling for recommendations to customers’ needs
* Assist with the development of the corporate partnerships
* Identify and articulate best practices within the industry
* Manage and track client and transactional information in SalesForce
* Support contract compliance

## Qualifications for financial account

* A good understanding of the processes surrounding trade credit related insurances
* Has a clear understanding of the insurance market in order to address technical/Client issues
* The ideal candidate will have experince managing client data within the financial services
* Bilingual English and French is required
* 10+ years relevant capital markets industry experience
* Extensive understanding of the Capital Markets and Partner ecosystem--customers (Investment Banks, Exchanges, Investment Management firms ) and partners (ISVs, SI’s)