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# Example of Lead Advisor Job Description

Our company is searching for experienced candidates for the position of lead advisor. 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 lead advisor

* Manage interactions with Customer Success Managers to respond to technical issues
* Manage interactions with Product Management, CX and Product Marketing in partnership with the Technical Lead
* The responsibilities include all aspects of the Energy Advisor 1, 2 and/or 3 and/or Commercial Representative
* Handle escalated customer request
* Perform supervisory duties as required
* Research billing disputes, deposits, final bill/bad debt accounts, RPU investigations , to resolve customer issues
* Process orders to satisfy customer requests concerning billing, electric and gas trouble calls, move ins, move outs, high bills, and related customer information inquiries
* Perform miscellaneous duties as required by supervision/management
* Process and document incoming faxes, e-mail, and internet requests from customers and apartment complexes on move ins, move outs, billing inquires, rebates, mailing address changes, itemizations, new gas and electric permanent/ temporary installations requests (residential and commercial)
* Handle customer requests from third-party agencies

## Qualifications for lead advisor

* Master’s Degree in Business, Economics, /Social Sciences, or a related discipline required
* Familiar with NCAA guidelines
* Excellent understanding of the U.S. Banking and Securities industry and experience working with a financial services consulting organization or a large bank
* Strong experience working in risk management and regulatory compliance domains of market, credit, and operational risk (e.g., Stress Testing (CCAR, DFAST), IFRS9/CECL, FRTB, Basel II/ III, BCBS 239)
* Demonstrate ability to work with subject matter experts in key areas of risk management to perform capability gap assessment, design a recommended future state, and outline an implementation strategy
* Excellent project management skills and knowledge of MS Project or similar tools is preferred