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# Example of Private Client Services Job Description

Our growing company is searching for experienced candidates for the position of private client services. 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 private client services

* Responsible for the full accounting processes, timely posting of all financial transactions to G/L, maintain the general ledger, generate & post all journal entries, coordinate monthly close, and prepare financial reports
* Oversee the Accounting functions including
* Prepare monthly/quarterly financial statements with related work papers
* Reconcile amounts charged to the intercompany account and provide supporting documents
* Support the PCS team by providing superior customer service to our high net worth clients
* Process client requests
* Accept and process mortgage applications
* Coordinate/follow-up with TMS team
* Supporting a Senior Account Executive within the team to manage a diverse portfolio of personal lines accounts, including home, motor and travel
* Ensuring that the highest level of service standards are displayed at all times, particularly in the placement, claims management and renewal of client policies

## Qualifications for private client services

* 2 years investment industry experience required
* Experience with High Net Worth Individuals, Families and Business Owners is preferred
* Proficient in corporate, individual or partnership taxation
* Experience with providing tax services to High Net Worth, Families and Business Owners preferred
* Series 7, 9, 10, 63 and life and health licenses
* Bachelor's and/or advanced degree in Accounting