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# Example of Private Client Services Job Description

Our innovative and growing company is searching for experienced candidates for the position of private client services. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for private client services

* Create and cultivate a client experience that exceeds the client's expectations while establishing the benchmark for service within the online brokerage industry
* Supervise associates and teach technical concepts to various levels of staff
* Clearly communicate work plan and objectives and manage project assignments
* Deliver a high-quality project on time and on budget
* Ability to delegate work and effectively manage a team of people
* Accounting services, including in-house bookkeeping bank reconciliations
* Reconciliation of year end brokerage statements to tax reporting statements (Form 1099) and trial balance
* Preparing basic income tax returns
* Ability to communicate directly with clients including working at client site
* Continually develop a working knowledge of Global Investment Control Private Client Services functions and interconnections with other team’s policies, procedures, and systems

## Qualifications for private client services

* The Level III Portfolio Revenue target is $1 million
* Works independently and autonomously and makes decisions on more advanced and complex issues
* Administers most complex and larger accounts
* Develops and maintains relationship with clients to discuss financial goals and objectives, explain terms and specifications of governing document and advises clients regarding additional banking needs, general estate planning questions and tax issues
* Ensures relevant client financial information is gathered, consults with clients about goals and objectives, compiles and analyzes data, coordinates with other internal personnel, prepares recommendations
* Meets with clients regularly to review proposals, obtains feedback and makes any necessary changes and assists with plan implementation as appropriate, providing assistance with portfolio management, estate planning, charitable planning and tax matters