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# Example of Services Relationship Manager Job Description

Our company is growing rapidly and is looking for a services relationship manager. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for services relationship manager

* Acting as the KYC owner for the assigned client portfolio , including onboarding clients and their products, in accordance with all AML/KYC policies and procedures
* Working collaboratively with areas such as client service, product, operations, technology, risk, credit, legal, and marketing to deliver the optimal client experience
* Keeping abreast of changes in the market and participating in industry forums and conferences to ensure market visibility for the J.P.Morgan franchise, and actively networking and leveraging information gathered, such as ACSA and FSC
* Leading regular trading services updates for FX and Securities Lending to existing clients and looking at opportunities to add value and optimise the overall services
* At least seven years of relevant sales or relationship management experience in financial services
* A proven track record of revenue generation from new and existing customers within the financial services industry
* Broad knowledge of financial markets, products and services
* Previous experience with sales and marketing of complex solutions
* A demonstrated ability to mobilise and lead diverse teams (internal and external) towards a common goal
* Work with Engineering and Product Marketing to define strategy to engage and drive usage of the Office and Skype free services, and ultimately upsell to paid products

## Qualifications for services relationship manager

* 5 - 7 years experience in the Mutual Fund Industry required
* A banking background is advantageous
* Must have sales experience within Commercial Dealership Sales (Floor Plan, Real Estate or Treasury Loans, ) or Sales Experience within the Dealer Captive Market again focusing on the commercial market
* Must have prior financial analysis experience with in depth knowledge of dealer financial statements
* Identifies and openly shares cross-selling opportunities with partners
* Commercial Credit Training desirable