



Example of Assistant Relationship Manager Job Description

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Our growing company is looking for an assistant relationship manager. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for assistant relationship manager

- Achieve world class excellence customer service by providing distinctive wealth management products to Treasures Priority Banking customers
- Manages business relationship with new customers/ existing
- Address and follow-up on customer service requests/issues daily eg
- Become part of a global and client-focused firm committed to wealth management
- Receive quality support for your client relationships through a suite of comprehensive products and services
- Team up with exceptional talents in a highly performance-driven environment
- Can expect to benefit from a competitive compensation model
- Assist with the management of fee increases, invoice checking and debtors
- Address and manage operational issues in conjunction with Operations Manager(s) and his / her team to ensure maintenance of service standards
- Liaise with external third party contacts

Qualifications for assistant relationship manager

- BS above degree
- Minimum of 3 years proven and progressive financial services and/or retail sales experience or equivalent, including evidence of strong sales results and knowledge of insurance and investment products for referral purposes

- Ability to build and manage relationships with others
- Microsoft proficiency (Word, Excel and PowerPoint)
- Minimum of five years proven and progressive financial services and/or retail sales experience or equivalent, including evidence of strong sales results and knowledge of insurance and investment products for referral purposes