



## Example of Associate, Client Services Job Description

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Our company is hiring for an associate, client services. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

### Responsibilities for associate, client services

- Respond to direct customer inquiries on the phone or through e-mail to provide support on SPT desktop software
- Provide technical support/problem resolution to external customers in a timely, professional, and courteous manner
- Independently research solutions to high end clients' technical problems with limited supervision
- Engage third party vendors and custodians with interfaces into PortfolioCenter to troubleshoot mutual client issues
- Build and foster positive and effective business relationships with day-to-day operational contacts within assigned customers
- Customer centricity, with a true vocation for client service and retention
- Ability to develop a thorough understanding of the Firm's investment philosophy and strategies
- Strong written and verbal communication skills and ability to interact with both clients and managers in other departments
- Self-starter who is capable of completing multiple projects within set deadlines
- Strong computer skills with proven proficiency in Excel, Word and PowerPoint

### Qualifications for associate, client services

- Utilize time appropriately to meet business goals
- Candidate must be have an ability to work well within a team environment
- Tremendous attention to detail and commitment to error-free work is

- BA/AA in Business or related field, strong organizational and communication skills, excellent phone manner are required
- Strong computer skills to manage daily responsibilities (Word, Excel, PowerPoint, and Data Entry), the ability to prioritize and work in fast-paced environment, the ability to make independent decisions based on information and data are necessary
- Fluent command of English is a prerequisite