

# Example of Client Advisory Job Description

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Our company is growing rapidly and is looking to fill the role of client advisory. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client advisory

- Communicate effectively with Client Advisors regarding their trust, agency, or custodial accounts
- Primarily responsible for working with the CAC Sales and Service's groups, technology, compliance, risk, legal, product, to help drive the organization's strategy to develop a new remote channel model
- Serve as a strategic partner and trusted advisor to leaders across multiple business units
- Understand the 'market' and strategic objectives of the business units, working with the business unit leadership on strategic workforce planning including
- Define and execute programs and projects necessary to achieve the Talent strategy, including plans for communications and change management to create awareness and drive adoption
- Collaborate with our India based HR team to ensure seamless strategic direction and leadership updates to business leaders for professionals located in our India offices
- Oversee complex employee relations issues, effectively managing risk, working with the Client Advisory leader, Legal function, and Global HR Leader where appropriate
- Lead or mentor other team members including those who are not direct reports as applicable, especially within project context seeking to upskill and cross-train wherever appropriate
- Play a key role in maturing the Talent Advisory COE by bringing in process excellence and innovation and driving consistent HR practices across all

- Work on complex high-profile mandates in the financial industry with regards to balance sheet, evolving market structure, capital markets, risk management and strategic issues

## Qualifications for client advisory

- Ideally you will be degree qualified in Economics, Business Studies or similar
- 5 -10 years of experience within Financial Services, preferably within a mass affluent channel
- No licenses required
- Strong ability to analyze problems, with attention to detail
- Experience in a leading financial institution with a proven track record in the training development/training delivery space / KYC business space
- Ability to solve problems independently, with detailed research and analysis, and present results