



Example of Client Data Services Job Description

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Our company is growing rapidly and is hiring for a client data services. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for client data services

- Build a team of operational professionals with a focus on excellence, collaboration and teamwork in serving the end client and realizing on the business potential
- Post Account Opening completion- account setups for portfolio account, wire entry and authorization, position reporting
- Work with Analytic Team to accurately define project objectives, and partner to determine methods for fulfilling objectives
- Work with management to set team goals
- Work closely with CTS transition managers, consultants, client executives and client contacts to facilitate the client implementation process
- Serve as a department resource for data related transition activities, including technology, databases, data evaluation/scrubbing and conversion strategies
- Participate in new client conference calls and client implementation meetings as requested
- Ensure data transition activities are properly audited and documented for internal and external stakeholders
- Keep abreast of industry trends for transitioning plan assets and corresponding plan records
- Set the business strategy for the GLAS client data interactions based on client needs, competitive, industry and market trends

Qualifications for client data services

- Ability to take work from inception and identification through resolution

- Applicants for this position should ideally have experience working with and implementing regulations within an operational or control department within a banking environment, a Compliance or Legal Department within a banking environment, or within a similar Operations regulatory function
- Internet literate to enable on-line searches
- Experience working with and implementing regulations within an operational or control department within a banking environment, a Compliance or Legal Department within a banking environment, or within a similar Operations regulatory function
- Must have experience working with and managing onshore and offshore teams