



Example of Client Management Job Description

Powered by www.VelvetJobs.com

Our growing company is hiring for a client management. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for client management

- Driving a positive and engaged team culture
- Taking ownership of major impact issues and acting as point of escalation
- Prepare product presentations for internal and external client meetings
- Conduct research to help in product positioning
- Contribute to white papers and marketing material
- Participate in select client meetings, as appropriate
- Deliver enhanced Global Banking Client Due Diligence standards for clients consistent with the company's AML/BSA (Anti Money Laundering & Bank Secrecy Act) policies, procedures and practices
- Support the operating model changes across people, process and technology
- Build effective relationships with both internal and external clients / stakeholders to expedite resolution of KYC renewals issues
- Maintain fluidity of renewals pipe to directly maximize revenue generation opportunities while ensuring full alignment with the company's policy and controls

Qualifications for client management

- Extensive experience in the Finance and Banking industry environment (e.g, fund administrator, brokerage house, custodian, investment bank) together with business project management experience
- Currently enrolled in an accredited baccalaureate program majoring in finance

- Demonstrated experience handling data-intensive projects, attention to detail is critical
- Build successful relationships with internal and external clients to drive adoption of technical solutions and resulting revenue streams (20%)
- Aid in the "hands-on" development of tech solutions for client projects (20%)