



# Example of Client Service Analyst Job Description

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Our innovative and growing company is looking for a client service analyst. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client service analyst

- Act as one of the main points of contact for high-net-worth, ultra-high-net-worth, and institutional client base
- Provide clients with a high level of consultative financial advice by using the full range of investment management products and services available at the Firm, including the development of asset allocations and portfolio recommendations using proprietary models
- Prepare and present client presentations illustrating results of customized analysis
- Keep current on macro-economic and product research to assist FA(s) with idea generation and monitoring of client accounts, portfolios, and investment strategies
- Produce customized performance analytics that aid in client reviews and the development of investment recommendations
- Participate alongside FA(s) in meetings with clients and prospects
- Build and expand relationships with client and prospects in part by leveraging Firm resources
- Navigate the Firm and become team's primary contact with investment strategy, manager research, wealth advisory, performance reporting, and institutional equity/fixed income research
- Delegate and oversee various projects and functions to junior team members, including account opening and maintenance and various administrative support duties
- Over time you will be expected to be able to identify products and services

## Qualifications for client service analyst

- Ideal candidate will be self-motivated, have excellent problem solving skills, and the ability to work efficiently
- 3 Years business to business customer service experience
- 2-yr degree or equivalent required
- \*\*The position will be housed in the Brooklyn/Metrotech location supporting the New Jersey, Philadelphia and Mid-Atlantic markets\*\*\*
- Conduct calls/visits with clients (health checks, training, relationship planning and review, analyst meetings)
- The position may require some traveling and short term assignments abroad on rare occasion