



Example of Client Service Job Description

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Our growing company is looking to fill the role of client service. 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 service

- Facilitate cash movements with client portfolios
- Ensures that all paperwork, policy and procedures have been adhered to in order to satisfy compliance requirements
- Assist clients with reconciliation and problem resolution
- Develop Goal Based Financial Plans (Money Guide Pro and eMoney)
- Support client communications (e.g., newsletters)
- Participate in client/auditor conference calls
- Coordinate plan document work requested for DC Department
- Support the team's senior professionals in all aspects of client servicing
- Support activities related to performance reporting and performance analysis
- Tasks include, but are not limited to, writing market and performance commentary, reporting, content creation

Qualifications for client service

- Ability to improve processes to enhance the client experience
- 2+ years of office work experience
- Strong track record of sales history - Significant experience with Enterprise Architecture (definition is inclusive of Business, Information, and Technology Architectures)
- Familiarity with standard enterprise architecture methodologies
- Strong consultancy skills are a must for this position

