



Example of Client Service Job Description

Powered by www.VelvetJobs.com

Our growing company is looking for a client service. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for client service

- Processes and tracks all client business
- Prepares documentation and reports for client meetings and provides follow-up after client meetings
- Provides general administrative support such as preparing correspondence, the completion of forms, generating reports, processing confidential documents, and updating the practice website
- Coordinates and manages special projects for various areas of the Company
- Prepare and complete required paperwork for account set-up and account transfers
- Provide continuous follow-up with external companies for new business transactions throughout the transition
- Manage various practice reports that track new business
- Complete follow-up from advisor meetings
- Handle client mail and process checks, as needed
- Accompany Client Service Teams to present at Client meetings as requested

Qualifications for client service

- **MUST** have two or more years of related work experience in financial services and client service
- Bachelor's degree in business, finance or accounting (optional)
- 2+ years of office work experience (optional)

- Utilize WillPLACE