



# Example of Onboarding Associate Job Description

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Our growing company is searching for experienced candidates for the position of onboarding associate. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for onboarding associate

- Have a tertiary degree
- Ensure adherence to GIM policies for all onboarding activities in order to reinforce a risk based approach to doing good business including AML / KYD
- Act as main point of contact for the UK Funds Sales Team and the business in respect of all due diligence, operational and contractual matters required for the onboarding of UK Funds intermediary clients
- Manage successful & accurate negotiation of appropriate documentation with the client
- Team members are responsible for reviewing existing processes and identifying service/efficiency improvements to improve the service provided to Clients and the business
- Onboarding new PWM hires and their clients, which includes both preparation work for their arrival
- Assisting with identifying, defining and enhancing process efficiencies which will benefit COB in EMEA and globally
- Providing further assistance as may be required within the COB team
- Co-ordinating amongst the wide range of internal and external parties (including Sales and Investment teams) that need to be involved in taking on new clients or changing client mandates
- Data integrity of all portfolio data, accuracy, exception monitoring

## Qualifications for onboarding associate

- A sound understanding of the capital markets business is necessary, as is a client-centric approach to the role
- Experience with manual testing, writing test plans, and reviewing test cases
- Review and understand new requirements and identify impact to Client Onboarding
- 2 to 4 years of relevant work experience (AML/KYC/compliance related) within corporate financial services industry
- Sound understanding and experience/knowledge of Control, Compliance, Investigation would be an advantage