



Example of Onboarding Associate Job Description

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Our growing company is looking to fill the role of onboarding associate. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for onboarding associate

- Trading and cashiering in client accounts per the direction of the Partners and clients
 - Determine service requirements and problem solving strategies and answer client questions to ensure a superior customer experience with successful resolution of all client needs
 - Maintain client contact data in Microsoft Dynamics CRM and manage pipeline of new business for Partners
 - Assist with quarterly statement production including review of billing files, quality assurance on investment performance and distribution of statements either hard copy or through online portal
 - Coordinate and prepare meeting materials, participate in client meetings when appropriate and implement post-meeting action items
 - Complete custom research projects and/or client reports when requested
 - Administrative tasks include backing up associates in other offices, phone coverage, correspondence, filing/scanning, and general office management
 - Act as go-to resource to support the Onboarding team with day to day operations
 - Resolve internal/external clients' inquiries
 - This is primarily a Supply Chain Operations / Transportation role but additionally you will interface with other internal technical and business teams, and contribute to new platform feature developments and improvements
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- Knowledge of Client Onboarding and Regulations is a plus
- Sound understanding of mutual funds, how products are offered in the UK wealth market and the Client Base
- Your strong analytical and problem solving skills, and ability to manage multiple, complex projects simultaneously
- Your proven, effective verbal and written communication skills
- You are able to work directly with clients and vendors in a consultative role
- Your sense of urgency and ability to resolve and/or manage around inevitable technical hurdles