



Example of Relationship Assistant Job Description

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Our company is hiring for a relationship assistant. 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 relationship assistant

- Assist and manage projects as directed by Relationship Manager(s) and or Head of Relationship Management
- Ensure a general market and product awareness is maintained
- Provide support to other business areas such as Share Plan Operations and Business Development where required
- Drafting and or reviewing of client related share plan documentation
- Identify own training needs in conjunction with Relationship Manager to identify relevant courses and advisory body seminars as appropriate
- Ensure the completion of all scheduled online training and the embedding of Treating Customers Fairly (TCF) as general business practice
- Ensure that all CDD (Client Due Diligence) requirements are undertaken and completed as directed
- Ensure the accurate maintenance of client records on the Salesforce client record system
- Ensure the Agreements Monitor is completed as directed
- Communicating and interacting with both core and team members from across the firm, with internal partners and product areas

Qualifications for relationship assistant

- A few years' experience as an Assistant or a junior Professional working in a corporate environment

- Maintaining and updating procedures to ensure work processes are aligned with the ISO 9001 accreditation environment
- 3+ years experience with Email Marketing and CRM in a B2C environment
- Handle formalities
- Support the preparation of client meetings