JOB DESCRIPTION

Job Title:	Client Relationship Manager
Reporting to:	Practice Manager

Brief description of role and responsibilities:

The purpose of the role is to support Financial Planners and ensure smooth delivery of excellent client service and client communication as per business processes.

Key Responsibilities & Accountabilities

Client Servicing

- Provide friendly professional point of contact for clients and enquiries (by phone, email and in person)
- To be the first point of contact for incoming calls
- Meet and greet clients and guests as they arrive at the office
- Prepare meeting rooms prior to clients or guests arriving
- Organise existing and prospective client meetings and actively manage all Financial Planners diary and workload
- Prepare client documentation in advance of and following client meetings (as per business processes)
- Send letters of authority to providers, chase for information and check when received before passing over to the Financial Planner
- Manage client service needs and client expectations to ensure client satisfaction
- Liaise with other team members on work progress per client account and keep clients informed (as per business process)
- Liaise with clients on any administration queries they may have
- Assist in client meetings when required (Witnessing)
- Ensure that relevant service components (as per client agreement) are delivered throughout the year in a timely manner (as per business process)
- Open and maintain client files to the required compliance standards
- Ensure action points resulting from client meetings are added to the workload and dealt with
- Send Letters of Authority and Change of Servicing Letters to Providers
- Complete checks for Anti Money Laundering
- Assist in the organisation of the Annual Client Christmas event

New Business Processing

- Check accuracy and completeness of new business documentation
- Ensure that all new business applications are processed accurately and efficiently, in a compliant manner and to the firm's standards
- Ensure all supporting documentation is maintained as per company procedures
- Record fees
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send letters, acknowledging business to clients

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Annual Reviews

- Obtain valuations and policy information from providers for client packs
- Prepare packs which include valuations and copies of net worth, income and expenditure to be updated and sent to clients with regards to their Annual Strategy Meeting, 8 weeks prior to the meeting
- Organise client review meetings as per Annual Review Process
- Ensure implementation of any agreed actions following the review meeting
- Complete checklist and scan documentation to back office system and file

General Administration

- Ensure back-office systems are kept up to date
- Open, scan log and allocate all incoming post
- Filter Financial Planners general information, queries, phone calls and invitations
- Other duties as directed by management

Miscellaneous

- Attend weekly team meetings and quarterly open forum meetings for the Professional Support Team
- Provide minutes of the team meetings and post to the N Drive

Office Security

- Ensure all windows, shutters and blinds are closed each night before the office is closed
- Ensure all lights are off, alarm is set and front door locked, all 3 locks

Qualifications

There are no set entry requirements, however you would be expected to have GCSEs/S Grades (A-C/1-3) in Mathematics and English, have excellent IT and keyboard skills and telephone manner.

Previous work in Personal Financial Services industry is desirable