JOB SPEC
CLIENT RELATIONSHIP MANAGER

Job Title:	**Client Relationship Manager (CRM)**
Purpose Of Job	To support Financial Planners and ensure a smooth delivery of excellent client service and client communication, as per business processes.
Reports To:	Practice Manager

Key Responsibilities & Accountabilities

Client servicing

- Provide a friendly and professional point of contact for clients and enquiries (by phone, email and in person)
- Organise existing and prospective client meetings and actively manage FP's diary and workload
- Prepare client documentation in advance of and following client meetings (as per business processes)
- 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 in formed (as per business process)
- Liaise with clients on any administration queries they may have
- Assist in client meetings when required
- Ensure that relevant service components (as per client agreement) are delivered throughout the year in a timely manner
- Open and maintain client files to the required compliance standards
- Ensure action points resulting from client meetings get diarised and dealt with

Client administration

- Check accuracy and completeness of new business documentation
- Ensure that all business applications are processed accurately and efficiently, in a compliant manner to the firm's standards
- Ensure all supporting documentation is maintained as per company procedures
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send Letters of Authority and gather accurate information as per business process
- Obtain illustrations and application forms
- Produce portfolio valuations
- Ensure fund top ups, withdrawals, switches, and rebalances are carried out accurately and within company timescales

Reviews

- Organise client review meetings as per Annual Review Process
- Prepare paperwork required for the reviews as per Annual Review Process
- Support FPs in the delivery of reviews, if needed
- Ensure implementation of agreed actions

General administration

- Ensure back-office systems are kept up-to-date
- Filter FP's general information, queries, phone calls and invitations
- Open, scan, log and allocate incoming post when needed
- Other duties as directed by management

Personal Specification

JOB TITLE: Client Relationship Manager

CRITERIA	E OR D
KNOWLEDGE	
Microsoft Word, Excel and electronic diary management	**E**
xxxxxx back office systems	**D**
Advanced Excel	**D**
Knowledge of Financial Services Products	**E**
Knowledge of cash flow planning tools	**D**
SKILLS	
Interpersonal skills to develop and maintain client trust and inspire confidence	**E**
Excellent communicator (both verbal and written)	**E**
Highly organised, methodical and disciplined	**E**
Shows initiative and takes personal responsibility for completing tasks	**E**
Able to work within defined business processes	**E**
Adopts a positive attitude, willing to assist others when busy	**E**
Able to work under pressure on occasions to achieve deadlines	**E**
Attention to detail	**E**
Ability to achieve agreed outcomes without supervision	**E**
Excellent ability to prioritise and plan workload	**E**
Evidence of correspondence raising and diary management	**E**
EXPERIENCE	
At least 2 years' experience working as an administrator	**E**
Previous PA experience from within financial services industry	**D**
At least 2 years working within a financial planning environment	**E**
QUALIFICATIONS	
Certificate in Financial Planning or equivalent	**D**
R01	**E**
LP2	**E**

D = Desirable
E = Essential