

CLIENT RELATIONSHIP MANAGER (CRM)

POSITION DETAILS	
Position Title:	Client Relationship Manager
Job Type:	Permanent
Hours of Work:	38 hours per week, Monday to Friday
Reports to:	Partner

POSITION REQUIREMENTS	
1. Summary	<p>The Client Relationship Manager (CRM) is primarily responsible for performing the tasks that comprise the implementation and ongoing administration of clients' financial strategies.</p> <p>The main focus of the role is to provide quality service and maximise customer retention and referral. The CRM needs excellent relationship management and administrative skills.</p>
2. Duties	<p><u>Key duties and responsibilities of the role:</u></p> <ul style="list-style-type: none"> • Handle non-advice related queries and provide non-advice related service to clients. • Liaise with third party providers. • Work with Planners to assist as required in actively managing the client relationship. • Managing the implementations of new financial products such as investments and insurance policies. • Maintaining accurate data and records. • Draft and produce client correspondence as required by Planners. • Coordinate and prepare required documentation for new and existing clients while working within deadlines. • Ensure client files are compliant. • Diary Management and client liaison.
3. Requirements	<p><u>Skills required for the role:</u></p> <ul style="list-style-type: none"> • Advanced skills in Microsoft Office. • Excellent written and verbal communication skills. • Sound administrative skills. • Ability to develop and maintain relationships with clients. • Participate in training and development.