



## **JOB DESCRIPTION**

### **Job Summary:**

The Client Service Manager provides an impressive level of client service ensuring all client interaction is completed at a very high standard of excellence and care.

### **Essential Functions:**

- Prepares all parts of client reviews for a complete and thorough summary of a client's financial situation.
- Attends and may schedule team meetings.
- Schedules client meetings as necessary.
- Discusses and organizes the follow-up tasks.
- Maintains a clean client file and appropriately adds tasks or calendar items
- Assigns or coordinates tasks appropriately to the other team members.
- Prepares client engagement agreements and supplements.
- Executes stock, bond, mutual fund, and other trades as directed.
- Assists in implementing new clients through creating agendas, tasks, follow-up items.
- Populates and maintains accurate client data in reporting systems.
- Prepares for client meetings by analyzing data from prior meeting, updating balances of all accounts, reviewing outside assets information, determining agenda items, and creating agendas for upcoming client meetings.
- Prepares or assists in monthly invoicing.
- Monitors continuing education for Advisor and other team members.
- Assists with various client mailings, client events, etc.
- Answers phone and emails and takes initiative to handle the client's needs.
- Assists with client communications and requests via phone calls, emails, in-person meetings, etc.
- Commits to ongoing education and professional development to remain current.
- Fosters an environment of open, honest, and timely communications.
- Completes other duties as necessary to ensure a strong team environment and incredible client service.
- Follows all compliance requirements.
- Ensures the values of Clayton Financial Group are incorporated into the duties and responsibilities of this position.

<b>Knowledge/Skills/Experience</b>
<ul style="list-style-type: none"><li>• Bachelor's degree in Business, Accounting or Finance.</li><li>• One-year financial services industry experience.</li><li>• Strong analytical skills and ability to solve problems.</li><li>• Obtain licenses and/or relevant certifications required/recommended for the position.</li><li>• Advanced computer skills, including advanced knowledge of the Microsoft Office Suite, internet search and research capabilities.</li><li>• Experience with industry back-office systems software.</li><li>• Exceptional oral, written, and interpersonal communication skills.</li><li>• Understanding of process improvement and project management techniques with the ability to manage both big-picture and process-level implementation.</li><li>• Strong problem resolution skills with the ability to be detail-oriented and accurate.</li><li>• Ability to work with staff and clients of all backgrounds and professions.</li><li>• Self-motivated with the ability to handle a heavy workload and work both independently and under direction.</li><li>• Effective organizational skills and ability to multi-task, follow-up and meet deadlines.</li><li>• Uncompromised ability to maintain confidentiality and integrity.</li><li>• Positive attitude and energetic willingness to learn and cooperate.</li><li>• Professional appearance and demeanor.</li></ul>