

Job Description

Job Title: Client Relationship Officer	Job Code: 250
Department: Client Service	Classification: Exempt
Reports To: Sr. Relationship Officer	Date Authorized: January 2022

Summary

Executes on the day-to-day deliverables of client service, including relationship management, account administration, and fiduciary administration for assigned client families.

Essential Functions

- Works closely with the Sr. Relationship Officer and serves as an internal resource to thoughtfully, timely, and without error:
 - On-board new clients
 - Support client relationships and proactively identify and resolve client issues
 - Administer accounts and perform fiduciary oversight functions
 - Coordinate the delivery of services (internal and external specialists)
 - Prepare and deliver client communications
- Develops an in-depth understanding of client preferences, needs, and concerns. Serves as a team resource to marshal people and information to ensure that client work is delivered timely.
- Assists, as needed, with a variety of accounting-related functions, including:
 - Deposit and disbursement transactions
 - Budgets
 - Preparation and filing of tax returns
 - Financial statement analysis
 - Financial transaction reviews
 - Fees and expenses
- Engages in high level trust administration. Works closely with others to prepare documentation supporting discretionary distributions and other discretionary decision-making to ensure risk mitigation, accuracy, completeness, and consistency.
- Responds to ad hoc requests, performs research, provides custom analysis, and drafts communication, to support the Sr. Relationship Officer in decision-making and the delivery of client service.
- Works cross-functionally within the Firm to ensure efficient workflows and the maximization of resources firm-wide.
- Fosters positive employee relations and champions the Firm's strategic priorities, objectives and policies.

Job Description

Supervision of Others

Does not have direct supervision of others.

Minimum Position Requirements

Education / Experience / Technical Skills

Bachelor's degree.

5+ year's related work experience.

J.D. or CPA required or a CFP® designation plus related work experience.

Proficient use of Microsoft Office products (Word, Excel, Power Point and Outlook) and Adobe Acrobat skills.

Competencies / Skills

Adaptability – adapts to change and different ways of doing things quickly and positively; addresses setbacks or ambiguity; deals effectively with a variety of people and situations.

Build Relationships -- builds and maintains relationships that support and improve personal / team effectiveness; cooperates and works with others across departments to achieve goals; treats others with dignity and respect and maintains a friendly demeanor; values the contributions of others.

Client Focus – focuses efforts on discovering and meeting the stated or unstated needs and expectations of clients.

Communication – expresses ideas effectively; appropriately adapts message, style and tone to accommodate the audience; listens actively to others.

Decision Making – uses sound judgment to make good decisions based on information gathered and analyzed; considers all pertinent facts and alternatives before deciding on the most appropriate action.

Initiative -- recognizes what needs to be done and accomplishes it proactively and with minimal supervision.

Integrity – shares complete and accurate information; maintains confidentiality and meets own commitments; adheres to organizational policies and procedures.

Planning and Organizing – plans and organizes tasks and responsibilities to achieve objectives; sets priorities; allocates and uses resources properly.

Quality and Thoroughness – pays close attention to detail, accuracy and completeness; shows concern for all aspects of the job and follows up on work outputs and with others to ensure that agreements and commitments have been fulfilled.

Physical Demands / Work Environment

Works indoors in a normal office environment that has environmentally controlled conditions.

Consistently operates and accesses information using a computer and other office equipment.

Works in a fast-paced environment with unscheduled interruptions.

Withstands repetitive wrist/hand movement including regular computer work.

This job description does not list all job duties. Occasionally, a supervisor or manager may request that you perform other duties. Management's evaluation of your performance is based on your performance of the tasks listed in this job description and these other duties. Management has the right to revise this job description at any time. This job description also is not a contract for employment. Therefore, either you or the employer may terminate the employment relationship at any time, for any reason.