September 2021

Job description

Job title: **Client Relationship Manager**
Reporting to: **Joanna Green – Practice Manager**
Location: **Appleton Fox, Southfield House, 2 Southfield Road, Bristol, BS9 3BH**

Responsibilities

Client Relationship Manager (responsible for the AFWM Client Review Process):

Manage the Client Review process which is as follows:

- Produce pre-meeting annual review packs (including RPQ) and send these to clients
- Speak with clients to gather information (e.g., Income/expenditure, assets/liability) as required by the report writer / financial planner
- Upload information to research systems
- Produce Client Valuations
- Use research output to decide on replacement funds and discuss with Richard Hansell (Managing Director)
- Create documents for meeting pack and pass to adviser
- Create the annual review report

Facilities Management Responsibilities

- Take responsibility for the smooth running of the Appleton Fox office – to include but not limited too; ensuring refreshments are replenished, franking machine, printer, and other shared office equipment.
- Monitor upkeep of equipment for effective use and relevant Health & Safety standards and refer to the Practice Manager as required.
- Work with the Practice Manager to manage installations and refurbishments as required.

- Ensure the phones are always covered (during office opening hours), arranging cover during periods of sickness and holiday.

Client Administrator responsibilities:

- Maintenance of client records on the back-office system (currently Intelligent Office)
- Preparation of client valuation reports, client review reports and maintaining client files to satisfy compliance requirements
- Uploading file notes to the back-office system, following client or company contact

- General administrative support including scanning, photocopying, faxing, letter writing and other applicable duties
- Completion, submission and follow up of applications, ensuring new business cases are processed in a compliant manner
- Requesting required documentation from clients and sending policy documents to clients
- Ordering quotes and requesting policy details for consultants
- Submitting and processing surrender requests, death claims etc
- Ensure that significant risk issues are referred to line manager where appropriate
- Make a constructive contribution to the continuing development of the team
- Proactively enhance industry knowledge, through external and internal sources

Knowledge, Skills, Experience

- Demonstrate practical awareness and basic knowledge of retail financial products and current regulatory expectations
- Analytical in solving tasks with a keen attention for detail
- Possess excellent organisational and time management skills with an ability to work under pressure and prioritise
- Deliver effective and positive communication, and demonstrate competent use of IT

Attitude & behaviour

- Desire to complete tasks to the highest standards and in a timely fashion, taking ownership and accountability for own actions
- A positive and proactive approach to work and a desire to help and support the wider team
- Calm and considered outlook in approach to problem solving