Client Relationship Manager

Job Description

Basic function

The Client Relationship Manager is primarily responsible for the communication and satisfaction of assigned MAP Retirement clients. The single most important aspect for success of a Client Relationship Manager is pro-active, responsive communication with all assigned clients and advisors. They must directly communicate with each client and advisor utilizing Teams phone/virtual calls, other virtual options as they are presented, or email based on the client's preference. Active communication setting clear, explicit expectations with clients/advisors is an essential skill to meet and exceed clients/advisor's expectations.

Client Relationship Manager is to serve as the primary point of contact for a book of business for both Defined Contribution and Defined Benefit plans of all sizes. The Client Relationship Manager must demonstrate relationship management, Analytical skills, and communicate all plan concepts including the ability to work independently as well as in a team environment.

Reporting relationships *(up, down & sideways)*

- Reports directly to the assigned Director of Account Management
- Functions side-by-side with other Client Relationship/ Account Managers
- May take direction from Managing Partner(s)

Authority (defined; "power to take action or make a decision")

- Assures client satisfaction is achieved
- Ensures Annual Administration, Plan Documents and Government filings are maintained and is compliant according to federal regulations

Responsibility / accountability

- Strengthen relationships with clients and advisors through delivery of phone and email
- Respond to plan sponsors and advisors' questions related to all aspects of their retirement plan including plan design
- Monitor annual plan projects, calendars, and milestones
- Communicate & administer annual plan compliance results and annual tax filings
- Maintain knowledge regarding industry trends and legislative/regulatory requirements and changes
- Proactively request information and alert clients to plan operational and compliance matters
- Prioritize, research, and resolve client questions related to technology, plan operation, compliance, and other matters
- Coordinate with other team members as required for support on recordkeeping and plan administration

Principle duties (**a.** what incumbents must **do:** often repeatable activities)

- Primary point of contact between 225 & 275 assigned clients
- Complete workload for assigned clients within standard timeframe set by Director of Account Management
- Prepare, review & communicate contribution allocation are accurate and shared timely as needed
- Prepare valuation report and meet plan year end deadlines as outlined by Director of Account Management
- Communicate 401(k) recordkeeping processes and technology
- Conduct client and advisor calls to ensure client satisfaction

Ongoing Client Management Duties:

- Primary contact responsible to meet and exceed client/advisors' expectations
- Identify & communicate individual training opportunities and needs as appropriate
- Recommend and initiate plan enhancements
- Maintain documentation on client projects and responses within FT Williams and PensionPro
- Participate in Director of Management/All staff meetings by presenting timely related topics
- Escalate plans to the Director of Account Management for review as needed
- May conduct peer review of other Account Managers as directed by Director of Account Management
- At times based on leadership and management will be asked to participate in other projects and/or tasks that are outside of the normal Client Relationship Manager roles and responsibilities

First and foremost, it is the responsibility of all team members to make sure that MAP clients and advisors are provided a high level of service and are satisfied with what is provided from our organization. Team members may regularly be asked to assist with items that may fall outside of their core responsibilities to meet and exceed client/advisor satisfaction.

The Client Relationship Manager must be a good communicator, display a positive "can do" attitude, be patient, multi–task, and work well on both routine & non-routine activities. They must be an outstanding time manager, capable of working strategically and thinking through issues. They must be able to work independently, as a team player and leader for other team members.