



**Job Title:** Client Relationship Manager

**Location:** Newtown, PA

**Job Purpose:** Looking for a dynamic and aggressive sales person who wants to take advantage of the current financial environment. This is a wonderful opportunity to work with a world-class organization. Our Client employs tactical strategies that have performed extremely well during the most difficult of times.

**Client Relationship Manager Job Duties:**

- Must maintain an effective working relationship with current clients by integrating our client's models and strategies.
- Must establish new client relationships and use these relationships to develop new business opportunities.
- Establish and maintain interpersonal relationships by communicating with people outside the organization, representing the organization to customers, the public, and other external sources.
- Provide information to supervisors, co-workers and subordinates by telephone, written form, e-mail, or in person.
- Identify main client groups and audiences, determine the best way to communicate publicity information to them, and develop and implement a communication plan.
- Establish and maintain personally challenging achievement goals and exerting effort toward mastering tasks.

**Skills / Qualifications:**

- This position is geared towards registered professionals that already have an established practice with a minimum of \$15 million in assets under management.
- Must have direct sales experience in broker dealer environment, Registered Investment Advisor or Insurance related practice.
- Must possess knowledge of business and management principles involved in strategic planning.
- Must be able to work independently with little or no supervision.
- Must possess strategic speaking and active listening skills.
- Must possess excellent verbal and written communication skills to convey information effectively to both in-house and outside customers and clients.
- Must possess a working knowledge of Microsoft Office Suites, as well as other financial and/or computer applications.

**Education:** Bachelor's Degree with at least two years of work-related experience, on-the-job training, and/or vocational training.

**Salary:** Salary commensurate with education and experience.

***Experienced. Discreet. Independent.***