Relationship Manager

Providing exceptional service to our clients starts with investing in exceptional people!
We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is a unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration, and respect. We are passionate about what we do. We have fun, we work hard, and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

The Relationship Manager Role
The Relationship Manager (RM) supports Lead Advisors with operational support and the execution of retention strategies for Cable Hill's existing client base. This is a client-facing role, requiring superior customer service skills. This is a salaried, exempt position, reporting to the Client Services Manager.

Duties & Responsibilities

- Manage and support client relationships to ensure a gold standard client experience. Engage in regular in-person, telephone and email client interaction.

- Collaborate closely with Lead Advisors at all stages of the client review meeting process, including preparation of materials and attendance at the meetings. Ensure accurate and detailed notes are entered into the CRM following the meeting. Follow up on action items.

- Execute client trades. Performs tasks associated with client's cash flow and money movement directives.

- Interact as needed with custodians. May assist Client Service Associates with troubleshooting custodian-related matters. Ensure the accuracy and integrity of electronic record-keeping with the firm's custodians.

- Positively engage with all members of the team in a professional office setting to support and advance Cable Hill's culture.

- Coordinate client service models to determine proactive client touch points.

- May prepare or oversee the preparation of various deliverables which directly support client service and acquisition such as portfolio review packets, greeting letters, presentation books, service agreements and compliance materials.

- Oversee the documentation related to client onboarding and ongoing maintenance including account applications, transfer documents and other forms as required.

- May perform calendaring functions with both internal teams and external clients, prospects and COIs.

- Ensure accuracy and integrity of client records, centers of influence (COI), and prospective clients.
- Assist with the training of new or newly promoted client-facing team members.

- Work with team members to ensure training and reference documents are accurate and updated as needed. Monitor industry trends and alerts and disseminates pertinent information as needed.

Other Duties

- Provide back-up support as necessary to peers as well as for other administrative functions. May occasionally provide back-up reception duties.

- Assist with projects for a variety of firm initiatives as needed.

Professional Qualifications

- A minimum of 2 years' experience in a client-facing role in the financial services industry.

- Current Series 65 or 66 license required.

- Undergraduate degree required.

- Proficiency in Microsoft Office products required.

- Experience with Salesforce preferred, but not required.

Skills & Attributes

Teamwork – Highly collaborative and dedicated to continuous perfection of CHP's ability to deliver superior customer service to its clients.

Integrity – Exhibits a high level of integrity through interactions with internal and external customers. Goes above and beyond to do what is right for team members and clients.

Customer Service – Exceptional internal and external customer service skills. Ensures positive interactions through active listening and professional feedback.

Communication — Excellent oral and written communication skills. Projects a professional, capable image in both action and appearance.

Leadership – Provides leadership through modeling a vision of excellence in the client experience. This vision is shared through coaching in a manner that provides a positive learning culture for client-facing staff members.

Adaptability – Remains professional when working with multiple personalities. Flexible with changing priorities, and successfully works with minimal supervision in a fast-paced environment.

C**apacity** – Strong time management skills, with an ability to effectively organize and prioritize tasks. Manages heavy, time-sensitive workloads, while maintaining accuracy through a strong attention to detail.

Judgment – Skilled problem-solving, particularly for obstacles in which the next course of action is unclear. Without hesitation, seeks guidance and direction when unsure of how to proceed.