## Specialist, Relationship Management

### Job Brief

This position requires professional experience in the areas of client relationship management, particularly in dealing with business to business interactions at companies with varying levels of staff. A knowledge of trust law and regulations as well as funeral and cemetery pre-need law is beneficial. This position supports the Trust Administration staff and Relationship Manager to ensure successful and smooth client relationships, focused primarily on the onboarding stage as well as external client communications. This person is responsible for proactive management of the onboarding process, signing up new clients in conjunction with sales personnel, and handing off to Trust Administration personnel once accounts are setup. A successful Specialist, Relationship Management will demonstrate effective teamwork and leadership skills, as well as a problem-solving attitude.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Act as a Specialist, Relationship Manager and liaison between new customers, operations and trust administration personnel. Strong interpersonal skills are required.
- Act as front line of client communication via the Customer Service phone queue as well as the Customer Service Inbox.
- Work to support the Relationship Management and Trust Administration teams to onboard new business and set up accounts, including preparation of client training materials and prospecting materials.
- Develop a solid understanding of ClearPoint's business and its clients, working with trust administration staff to adjust client communications according to needs.
- Work, in conjunction with Relationship Managers and Trust Administrators, to produce necessary new account documentation for auditors and state regulators, as needed, to facilitate required examinations of customer accounts.
- Responsible for working with Relationship Managers, Trust Administrators and Assistant Trust Administrators to ensure all items needed for Fiduciary Oversight Committee approval have been received for new accounts and ownership changes.
- Work with Reporting staff and Relationship Managers to review and produce customer meeting books, checking for errors and creating client specific pieces based on needs.

### REQUIREMENTS

- Two year degree in related field or equivalent experience.
- Two to three years related experience or equivalent combination of education and experience.
- Demonstrated relationship building skills, problem solving, decision making and communication skills, both written and spoken.
- Continuous Improvement mindset. Must take initiative to address issues proactively.