# Relationship Manager Role Description

Job Title: Relationship Manager
Reports To: Wealth Manager

## Job Purpose:

The Relationship Manager (RM) position is a significant role within our company. You will perform a varying multitude of client service tasks and provide internal office support. The RM reports directly to a Wealth Manager and will serve not only as a key member of our team, but also the initial point of contact for the clients of AEGIS Financial.

## Company Culture:

AEGIS Financial is a company whose culture is defined by the character of its team members. As a result, each team member must possess an unyielding desire to exceed client expectations. We serve our clients the way we want to be served. Being entrusted with our clients' livelihood and their life's work means that every activity and interaction requires the highest degree of ethics and professionalism. Our continued success depends on a diverse array of professionals working together towards common goals and each of us promoting a shared culture of excellence and mutual accountability.

AEGIS Financial boasts a unique work environment that values teamwork and strategic cooperation among all teammates. Each team member brings a unique skill set and experience to the organization, and we value and respect everyone's individual talents. AEGIS Financial expects all team members to be respectful of each other and strive to make collaboration and cooperation cornerstones of our culture and success.

Accountability is also a key element of success. AEGIS Financial is committed to a proactive culture so that each of us is accountable for the very best service for our clients within a reasonable timeframe.

## Principal Accountabilities:

- Responsible for client onboarding coordination, which includes managing the Wealth Managers prospect pipeline and transitioning new assets to AEGIS Financial
- Servicing and maintaining the ongoing client relationship
- Responsible for preparing the appropriate internal documents and provide recommendations to the Wealth Manager for meetings

- Participate in client meetings – reviewing concerns, beneficiaries, assisting with technology, and transcribing notes and follow up letter from meetings
- Educate clients on the on-line tools and resources available to them
- Attend client/prospect events and seminars
- Anticipate client needs, solves problems, and follows through with exceptional service
- Respond to incoming emails and telephone calls in a professional manner to ensure that the client's request is met in a timely fashion.
- Interact with Raymond James home office staff to develop cooperative relations and guarantee timely follow through on requests.
- Interacts with Professional Partners to develop cooperative relationships to meet client's needs
- Document all relevant action items and tasks being tracked in CRM
- Execute project-related tasks to contribute to the firm's development
- Stay current and understand the firm's policies and procedures in an ever-changing regulatory environment to articulate the purpose for certain requirements to clients

## What we look for:

- 3 or more years of prior industry and/or administrative work experience
- Bachelor's degree or industry experience comparable
- FINRA Series 65 or 66 qualified
- Proficient in Microsoft Office Suite (Microsoft Excel, Word, Outlook, PowerPoint) and Adobe PDF
- CRM Database experience and task management preferred
- Ability to improvise and proactively assist in client requests or firm tasks
- Excellent verbal and written communication skills (including e-mail); ability to adeptly exchange ideas and information.
- Ability to communicate with respect using appropriate eye contact, language, grammar, and voice in all situations
- Excellent organizational skills – ability to prioritize workflow of self and Wealth Manager to achieve goals in a timely manner
- Proven reliability in attendance and performance
- Strong work ethic and develop and maintain positive working relationships with others
- Detail oriented with emphasis on accuracy
- Take pride in your work and the team's goals
- Critical thinking and proactive problem-solving skills are important
- Eager to continue learning through acquiring knowledge/skills necessary for the position

## What you will love:

- Fast paced team environment
- A firm you can grow with
- Flexibility in working hours to attend client events, networking or meeting outside normal business hours

- Professional to Business Casual Dress Code
- Team that is passionate about achieving results for our clients
- Occasional travel
- Continuing education
- Passionate about giving back to the communities that we live and work in

## Benefits:

At our firm, we understand that our employees work hard, so we offer a benefit program to help you achieve a successful work-life balance. Our continued success depends on a diverse array of professionals working together toward common goals while striving for independence, innovation, intelligence, and integrity. It is a rewarding foundation where unique individuals are given the tools to excel through their own hard work and determination. We foster a friendly work environment where all associates are considered family.
Additional benefits for the RM include:

- Quarterly bonus plan
- Health & Group Term Life Insurance Plan
- Long Term Disability
- FPA Membership
- 401(k) retirement program with company contribution
- Paid Time Off
- Paid Holidays
- Continuing Education Reimbursement Plan
- A complete list of benefits can be found in the Employee Handbook.

## Salary Range:

Based on education & experience

**Next Career Path:** Wealth Manager or other paths within the firm

**If you are interested in learning more:** Please send cover letter, salary requirements and resume to careers@aegis4me.com.