

Job Description

Senior Relationship Officer

Please answer the following questions with your application:-

- Please confirm you have at least 7 years relationship management skills.
- Please refrain from applying if this should not be the case.
- Please confirm more than 80% of your current clients are your own responsibility.
- Please confirm you have been responsible for your own client / business acquisitions.
- Please explain why an Investment Consultancy solution is an optimal one?
- Please explain why not hiring you would be the greatest mistake made by Peritus?

Job Purpose

To build and maintain your own client base and support the client base of the Managing Director

Principal Functions

◆ Client Support

- Visit all Clients at least quarterly
- Communicate with pro-activity and sensitivity to needs
- Nurture and grow an intimate relationship with each account
- Develop and understand all aspects of client life
- Become Trusted Advisor and protector of the family
- Educate and develop clients' investment knowledge

◆ Business Development

- Visit key centres monthly to develop relationships
- Pro-actively communicate to key relationships

◆ Client Reporting

- Produce tailored quarterly reports

◆ Functional Work

- Maintain and enhance CRM Database
- Actively contribute to business planning and direction of company's strategy

Minimum Requirements

- Mother tongue command of written and spoken English
- Relevant Financial Qualifications
- 7 – 10 years relationship manager experience in the Financial Services Industry
- Desired background – Private Bank – Asset Manager
- Client Relationship Experience
- Exposure to small team environment

Personal Qualities

- Highly motivated
- Strong values of ethics and integrity
- Self starter
- Attention to detail
- Communication / Articulate
- Service driven attitude
- Team player

Compensation

Remuneration will comprise of a fixed salary in line with the candidates' experience, an annual bonus and revenue sharing on new business acquisition

Application Process

Candidates should provide the following:-

- Copies of all Educational and Professional Qualifications
- References for each position held
- Examples of written letter, communication style

Please send your application to James Day, james.day@peritus.co.uk