Client Relations Representative

Job Purpose (Job Summary):
The Client Relations department is committed to providing a “customer first” culture at all levels. We are also committed to delivering the highest level of quality service to our client base while maintaining costs at a reasonable level. Our focus is putting the Interest of our client’s first and building stronger relationships, which will foster customer loyalty. We also believe strongly in offering value added services that exceed expectations with all contacts. The Client Relations department’s focus with all contacts is to identify opportunities to build stronger relationships, enhance operational efficiencies and reduce costs with our distribution partners through the following mediums: face to face client interaction, phone, email, letters, fax, and client walk-ins by professional Relationship Managers and Client Facing personnel. In all of our dealing with our internal and external client base we are continuously striving to move our business forward as well as retain and attract assets. Working within a fast paced environment, the Client Relations Representative will be responsible for delivering exceptional customer service to both our internal / external customer base. This highly motivated and energized individual will professionally develop value-added creative solutions to serve our customers’ needs using such techniques as Service with Integrity. The candidate must be able to build strong relationships and maximize customer loyalty by providing “best in class” customer service. With the use of various applications, the candidate will be responsible for analyzing, researching and taking the initiative for resolving issues and problems in a proactive manner. Extensive involvement in day-to-day operations, as well as the ability to develop positive working relationships with other departments will also be a key component of this position.

Key Responsibilities / Duties:

- Responsible for representing the company in a professional manner across all media types (i.e., by phone, through written and e-mail communication and web material)
- Educating our clients on all Invesco products and services and industry trends
- Responsible for developing and offering business building ideas to enable our client base to become more efficient in the way they do business with Invesco
- Responsible for handling all incoming calls and providing excellent client service
- Responsible for keeping up-to-date on current events
- Work closely with other departments and representatives to build, reinforce and maintain existing business and relationships
- Responsible for all administrative client service issues. (i.e., commission rebates, rejected trades, problem resolution)
- Ensure all information requested by the investors / sales representative is forwarded on a timely basis
- Highly diligent in understanding customer requirements
- Responsible for tracking, reporting and developing solutions to achieve optimal results

- Demonstrating strong multi-tasking skills while still being accessible to our client base by performing the day-to-day operations
- Other duties as assigned

Work Experience / Knowledge:

- 6 months to 2 years financial services experience, an asset
- Bilingualism (English / French), an asset

Skills / Other Personal Attributes Required:

- Working knowledge of MS Word, Outlook and web-based technologies

Formal Education: (minimum requirement to perform job duties)

- Post-secondary education, strongly preferred
- Investment Funds in Canada Course (Note: If not completed at time of hire, must obtain within prescribed period of time)

License/Registration/Certification: (minimum requirement to perform job duties)

- CSC or other industry related-courses, an asset