PRIO
WEALTH

Job Description

Position: Relationship Manager

MISSION

As an important member of Prio Wealth, the Relationship Manager acts as the primary contact for assigned clients. The Relationship Manager is responsible for the management and monitoring of the client's needs ensuring a consistent positive client experience including working with the team to ensure all commitments are completed and followed through in a timely manner.

This position requires a pro-active approach and the ability to work independently. The ideal candidate should exhibit high standards, excellent communication skills, good judgment, and ability to take initiative and prioritize daily tasks. The ability to effectively manage time and multi-task with attention to detail is critical to this role.

ESSENTIAL RESPONSIBILITIES

Client Development:

- Actively participate in all assigned Advisor client meetings.
- Demonstrate the ability to escalate potential client issues to Adviser as appropriate.
- Actively document all notes and action items during client meetings and ensure all commitments made by the Adviser are being completed in a timely manner.
- Review assignments for each client and work directly with team members to ensure all follow-up and action items as the result of client meetings are documented in the CRM and completed within the specified time frame.
- Responsible for reviewing statements, forecasting review data, developing a meeting agenda format, creating presentations, case documentation and deliverables for all assigned clients.
- Manage suitability documentation for client investments.
- Ensure compliance notation is adhered to; demonstrate suitable and appropriate recommendations to ensure quality standards, including full and fair disclosure. Initiate, process, and follow-up on new business, including the accurate completion of the onboarding process.

Client Relationship Management:

- Act as the primary point of contact for all client interactions, working with team members to ensure a timely response to all client questions and concerns.
- Establish and maintain positive relationships with existing clients to ensure satisfaction.

POSITION SPECIFICATIONS

Experience and Education:

- A Bachelor's degree is required.
- Minimum of 3 years working in a client service role.
- Comprehensive knowledge of financial industry.

Skills and Knowledge:

- Demonstrates analytical ability, good judgement, problem solving, responsibility, personal integrity, and is able to deal with confidential information on a daily basis.
- A self-starter with a strong sense of ownership, positive professional attitude, and demeanor.
- Proficient in Microsoft Office (Word, PowerPoint, Excel, Outlook).
- Experience in Dynamics 365 or other CRM and Tamarac suite of products highly desired.
- Excellent customer service, oral and written communication skills.
- Professional and articulate with strong attention to detail.
- Ability to work efficiently, effectively, and independently to see projects through to conclusion.
- Excellent time management, strong organizational skills, ability to prioritize multiple tasks and anticipate potential problems.

Roles and responsibilities can often be expanded to accommodate changing business conditions and goals, as well as to tap into the skills and talents of the individuals in the company. Accordingly, associates may be asked to perform duties that are outside the specific functions that are listed.

ABOUT PRIO WEALTH

When we founded Seaward Management 30 years ago, we looked to give our clients advice that worked for them and their goals. We built our registered investment advisory firm to help them make the most from their money. Fast-forward three decades and we're still focused on individualized wealth management but with a wider view. We've learned from our clients that making financial decisions is even more about life – and less about money – than we thought.

We discovered that life's priorities drive money decisions not the other way around and that people's values and their views on money are what's central to managing wealth. The problem is most advisors don't have a framework to help clients clarify their priorities and make good choices and trade-offs in their financial lives.

With this insight, we made the decision to evolve our wealth management approach and to add new tools to bring life and money together for our clients. Our new name, "Prio," reflects the way we help clients understand how they feel about money, determine what really matters to them and then use their priorities to guide every decision we make together about their finances.

We continue to be a leading investment firm with deep experience in wealth management and planning, but we are now even stronger champions for our clients. We understand people want to live a rich and meaningful life, and since getting there can be complicated, our approach offers the clarity, confidence, and control to make managing life and money so much simpler.