



Relationship Manager

Job Description

The Relationship Manager role is the perfect fit for someone who not only has an uncanny eye for detail but loves to meet new people and build relationships. This person considers quality to be their number one priority, which through high accuracy, is proven in their work. The Relationship Manager is someone who thrives in a fast-paced environment, has organizational skills like no other and loves working closely as a team. The perfect person for this role sees client service as their number one focus and has something that can always be enhanced. If this describes you then we would love to have you on our team!

About you

- You have superior organizational ability and follow-through skills
- You love helping people
- You have the ability to anticipate and solve problems
- You have exceptional grammar skills
- You are detail-oriented and are a natural organizer
- You are experienced in Microsoft Office
- You are very well-spoken and professional in appearance
- You have a warm and professional demeanor
- You are an experienced user of a data base, contact management or Client Relationship Management program.
- You are willing to travel and work in both our Fairmont and Jackson, MN locations

Responsibilities & Activities:

- Provide top-notch concierge service to clients on a pro-active basis
- Create, update, and maintain client files, CRM notes & to-do activities
- Data entry, prepping and processing forms, tracking completion of tasks, updating client records
- Follow service deadlines and timeframes of all tasks, with the goal to meet or exceed client expectations
- Prepare advisors for client meetings by reviewing a task list, printing meeting agendas, and completing any other necessary prep work
- Responsible for taking and entering meeting notes into CRM, entering tasks and processing within the timeframe assigned
- Respond to client requests for service and process within service standards
- Research and trouble-shoot service issues
- Work with scheduler to maintain consistency in advisor calendar
- Answer phone calls as a back-up
- Attend company sponsored events

How to Apply:

- Email resume, cover letter and personalized video as to why you'd be the best fit for this position to Tina Coquyt at Tina@sweetfinancial.com