JOB DESCRIPTION

Post Title: **Client Relations Officer**

Reporting to: Client Relations Director

Location: 4th Floor, 22 Lavington Street, London SE1 0NZ

Purpose

The Client Relations Officer is responsible for supporting the Client Team in managing and maintaining effective relationships with London Local Authorities (LLAs)

Main Duties and Responsibilities

- Act as a point of contact for London Local Authorities (LLAs), their advisers and other key stakeholders in responding to requests for information on their portfolio with LCIV
- Work in collaboration with stakeholders in the capture of useful information, its subsequent reporting and dissemination as part of enabling the collective success of the LCIV pooling programme and wider investment strategy
- To assist in the development and production of a range of communication materials including the preparation of key information documents and presentation packs for LLA meetings
- Take ownership for the maintenance and development of the LCIV's client relationship management system (Salesforce), ensuring that LLA information is kept up to date and pooling opportunities and meeting notes are captured and monitored
- Produce regular Management Information (MI) packs from Salesforce as required
- Support and assist with the provision of regular reporting to LLAs via Quarterly Investment Reports, monthly Fact Sheets and ad hoc reporting requests
- Attendance at LLA and stakeholder meetings as required to explain key information in relation to their funds
- Be responsible for the MiFID II opt up process and be the key contact for LLAs to ensure that they are 'opted up' as required
- Develop and manage internal and external collaborative relationships to effectively meet LLAs' needs and expectations
- Develop relationships with external suppliers, principally Northern Trust, and other providers to ensure effective and efficient operation of the client management relationships
- Work with the Operations team to ensure the successful on-boarding of LLAs, including subscriptions and redemptions and generally assisting with LLA transition activity

Person Specification

Essential Requirements

- Relevant experience gained in a client relationship role and/or communications role
- Previously worked in a pension organisation, asset manager investment or insurance company
- Strong collaborative skills and ability to work in a small team
- A natural organiser with an attention to detail
- Previous experience of supporting the Operations Team on things like, subscriptions, redemptions etc
- Flexible and enjoys a diverse and challenging workload
- Good verbal & written communication skills (report writing, formatting etc.)
- Proficient IT skills, with experience of using a range of software packages, such as, Salesforce, Excel, Word and PowerPoint with a willingness to learn new IT skills systems as the company evolves
- A self-starter with the ability to be effective with minimal supervision
- Ability to work well under pressure, organised and able to prioritise

Desirable Requirements

- Investment Management Certificate (IMC)
- Communications and marketing experience
- Events management
- Data analysis

This job description is aimed to be illustrative and is not exhaustive of all the duties and responsibilities which could be contained within this position. The post-holder may be asked to undertake other duties and responsibilities which are commensurate with this area of work and grade.