



Job Description

Job Title:	Relationship Manager, Advisor Services
Reports To:	EVP, Advisor Services
Salary:	TBD

Job Purpose

The successful candidate is a member of the Advisor Services team reporting directly to the Executive Vice President of Advisor Services. This team acts as the front line of service and support to the firm's independent registered investment advisor clientele. The team's mission is to provide a superior client service experience to Bellatore advisors by delivering proactive, tailored solutions based on the Total Business Solution. This mission is guided by a commitment to our clients' success and a dedication to philosophy, process, accountability and results.

Duties and Responsibilities

- Provide day-to-day operations and account management support
- Provide front office application training and support to new and current advisor clients
- Responsible for extracting a 360° view of advisors and their practices to assist in providing a customized service offering leading to deeper and more meaningful client relationships
- Develop a comprehensive understanding of the Bellatore Total Business Solution in order to assist advisors with accessing and implementing the services in their practices
- Act as a liaison between the Advisor, internal Bellatore departments and custodian(s) to research/resolve any administrative issues
- Identify training requirements to ensure advisors and their staff are fully supported in managing the administrative requirements of their client relationships
- Proactively monitor the transfer and status of new accounts to ensure a seamless transition of all account related activity
- Provide a superior advisor experience based on quality control, communication and resolution of all outstanding requests
- Engage firm Specialists in delivering case specific expertise when required
- Coordinate delivery of customized solutions and services
- Regularly participate in the internal training program for role specific skill and industry knowledge development
- Other duties as assigned from time to time

We invite you to visit us at www.bellatore.com to learn more about our company.

Please send resume to: hr@bellatore.com with "Relationship Manager" in the subject line.

Bellatore is an Equal Opportunity Employer.