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Client Service - US Asset Management Company

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募集職種

人材紹介会社

マイケル・ページ・インターナショナル・ジャパン株式会社

求人ID

1516644

業種

アセットマネジメント

雇用形態

正社員

勤務地

東京都 23区

給与

経験考慮の上、応相談

更新日

2025年01月22日 09:52

応募必要条件

キャリアレベル

新卒・未経験者レベル

英語レベル

日常会話レベル

日本語レベル

ネイティブ

最終学歴

大学卒：学士号

現在のビザ

日本での就労許可が必要です

募集要項

Our client, a top tier asset management company is seeking a diligent and dedicated Client Relations Analyst to join their team. The successful candidate will be responsible for maintaining and strengthening relationships with clients and work very closely with the Relationship Management team to provide seamless client service.

Client Details

Our client is a large US asset management company with over 2 trillion USD in asset under management. They pride themselves on their unique investment process, thorough fundamental research, long-term perspective, and emphasis on partnerships.

Description

Retain client relationships by delivering proactive client servicing:

Provides ongoing service to external institutional and intermediary clients:

- Resolves critical service inquiries (e.g., transactional, investment queries, compliance, fees/billing, operational)

- Liaises with internal departments and utilizes various systems or other resources to serve as a client advocate and collect relevant information to resolve service inquiries.
- Provides relationship team visibility to client interactions. Escalate critical items to relationship team or other areas internally if necessary.
- Assists in planning and executing client Due Diligence meetings as needed, which may involve hosting in-person client meetings.
- Prepares for and co-facilitates recurring meetings with Distribution and other internal team members.
- Supports the development of annual client business plans, and tracks progress against goals throughout the year.
- Conducts research and shares perspective to inform sales approach with existing clients.
- May provide support to Consultant teams within Distribution including assisting with responses to Consultant firm inquiries, RFI/RFP coordination and other ad hoc operational service requests.

Operational Support & Reporting: Responsible for coordination of all aspects of operational servicing:

- Coordinates with legal and operational teams to handle account set up, IMA and investment guideline negotiations, account transitions, new market openings, transfers, cashflow management, and terminations.
- Arranges and, with supervision, chairs meetings with internal departments, clients and/or consultants to discuss servicing and operational requests.
- Serves as the main interface between external clients, their service providers (including, but not limited to, consultants, transition managers, custodians, and record keepers) and internal departments within the company.
- Provides ad hoc reporting and internally driven organizational communications regarding routine matters to clients and consultants.
- Partners with the Reporting Team to define ongoing client reporting support.
- May deliver a variety of compliance and regulatory reporting.
- Coordinates the process and reviews responses to due diligence questionnaires and RFIs.
- Collaborates with Global Fee Consulting on all fee-related matters.

Business & Technical skills

- Demonstrates a working knowledge of the department's functional responsibilities, mandates, investment vehicle structures, fees, different business models, internal policies, practices, reporting and regulatory requirements.
- Demonstrates a working knowledge of the interdependencies with various institutional clients, business leaders internally including Portfolio Managers, Relationship Managers, Governance committees, boards, etc.
- Demonstrates a working knowledge of the investment management industry as it relates to institutional market.
- Demonstrates an in-depth knowledge of Microsoft applications and business applications. Exhibits knowledge in troubleshooting issues and creatively enhancing work assignments.

Job Offer

- A competitive salary package.
- An opportunity to grow your career in the Asset Management company.
- An opportunity to work at a top tier institution.

If you're a dedicated and detail-oriented professional looking for a new challenge in the financial services sector, we'd love to hear from you. Apply now to join our team in Tokyo!

To apply online please click the 'Apply' button below. For a confidential discussion about this role please contact Tang Rea on +81368328606

スキル・資格

A successful Client Relations Analyst should have:

- At least 3-5 years of work experience, ideally within the Financial Services industry.
- Experience facing institutional clients is welcomed, but not crucial for application.
- Native level Japanese language competency and conversational English language competency is required.
- Excellent communication skills, both written and verbal.
- Interests in developing a career in asset management, in a client-facing capacity.

会社説明

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