FUTUREGROWTH
/ ASSET MANAGEMENT

FUTUREGROWTH ASSET MANAGEMENT IS RECRUITING!

We have an exciting opportunity available for a **Client Relationship Officer** in our Client Management team.

Futuregrowth is committed to transformation. A strong preference will be given to suitably qualified previously disadvantaged candidates.

Client Relationship Officer
Are you passionate about investments, and seeking a rewarding career in fiduciary asset management? Do you have strong communication and interpersonal skills; are you highly organised and adaptable, with a strong ethical base? Then this position might be for you!

Who is Futuregrowth?

Futuregrowth has been South Africa's leading developmental, responsible, and fixed-income investor for over 25 years. We manage a range of fixed interest and development funds, and play a key leadership role in the South African asset management industry. We are committed to investing our clients' funds in a responsible manner, with the interests of our clients always coming first.

Purpose of the position

The Client Relationship Officer role combines client relationship management with specialized onboarding and regulatory compliance. This position is key to delivering exceptional client experience, acting as the main point of contact for operational and service matters across institutional clients and consultants.

Key responsibilities of the position

- **Client Service and Relationship Management**
  - Acting as the primary contact for all operational and service-related client requests and queries;
  - Building and maintaining trusted relationships with clients by delivering on commitments;
  - Proactively identifying client needs and expectations, using feedback and service insights to recommend and implement improvements that enhance the overall client experience; and
  - Escalating critical client feedback to manager for immediate resolution.

- **Case Management System**
  - Responsible for tracking, monitoring and resolving all assigned client queries in the case management system ensuring SLA compliance.
  - Maintaining accurate and complete case data to enable reliable reporting, tracking, and insights that support excellent client service delivery.

- Escalating complex issues when necessary while ensuring clients receive timely updates and resolutions; and
- Supporting the team with the implementation of improvements as the system matures, ensuring alignment with client service needs.

- **Client Onboarding and Transitions**
  - Assisting onboarding specialist by acting as primary contact for clients throughout onboarding, driving timelines from initial engagement to portfolio setup while ensuring strict SLA adherence and smooth transitions;
  - Assisting onboarding specialist by conducting AML, KYC, and FICA compliance checks for your dedicated list of clients; and
  - Assisting through collaborating with the onboarding specialist and internal teams in the periodic KYC refresh and remediation cycles.

- **Client Data and CRM System**
  - Ensuring that client information is updated and comprehensive AML/KYC compliance documentation maintenance is completed;
  - At all times maintaining accurate, up-to-date client records, onboarding status tracking, and interaction logs in the CRM system; and
  - Tracking all client interactions, onboarding milestones, compliance checkpoints, and feedback in the CRM system to identify service improvement opportunities.

- **Client Reporting and Audits**
  - In partnership with finance, dispatching client fee invoicing, resolving any issues and follow-ups ensuring revenue protection;
  - Responsible for supporting client audit processes by providing requested information and timely and accurate responses to ensure client compliance; and
  - Responsible for the generation and delivery of client ad hoc and bespoke reporting as needed.

- **Client Meetings and Presentations**
  - Supporting the preparation for client review meetings;
  - Over time, taking ownership of hosting service review meetings; and
  - Supporting in providing data or presenting to clients when requested.

- **Collaboration and Cross-Functional Engagement**
  - Working closely with internal teams, such as Portfolio Management, Sales, Compliance, Risk, Legal, Client Operations and Client Reporting, to ensure seamless delivery of services and support; and
  - Assisting with internal projects aimed at onboarding process improvement, compliance enhancement, automation initiatives, and client experience enhancements.

- **Process and Risk Management**
  - Ensuring that all related process documentation is current and adhered to;
  - Contributing to continuous improvement initiatives and digital transformation projects, particularly in onboarding efficiency and compliance automation; and
  - Identifying and mitigating operational and compliance risks within client service and onboarding processes.

Qualifications

- A recognized tertiary qualification in Commerce or Finance is mandatory, including but not limited to BCom, Finance, Investment Management, or Accounting.

Knowledge and experience required

- 5-7 years of experience in client services, relationship management or a related operational role.
- In-depth understanding of asset management, including various asset classes, investment strategies, and risk management.
- Familiarity with the regulatory environment and compliance requirements for asset management firms.
- Awareness of industry trends and emerging technologies in client experience and relationship management.
- Proficiency in Microsoft Office Suite, particularly Excel, Outlook, PowerPoint, Planner, and SharePoint Online.
- Experience with Charles River, Hiport, Infostore etc
- Experience with CRM systems, such Microsoft Dynamics 365, is a plus.
- Familiarity with reporting systems and data visualization tools like Power BI, or similar platforms is a plus.

Key competencies and behaviours

- Has an exceptional ability to grow relationships and build rapport with clients and team members alike.
- Excellent communication (verbal and written), interpersonal, and relationship-building skills.
- Strong problem-solving and analytical abilities.
- Ability to work independently and as part of a team.
- Ability to work collaboratively with internal teams and external clients.
- Detail-oriented and highly organized.
- Adaptable and able to manage multiple tasks and priorities.
- Highly dynamic thinker that can take responsibility and have patience to deal with complex queries.

- Comfortable with learning to use new software and adopt new technologies.
- Is flexible and innovative in their ability to offer unique yet practical solutions to clients.

Recruitment process

Selected candidates will need to attend a series of competency-based interviews/activities and a psychometric assessment.

Application Link

Click here to apply (https://bit.ly/4bLe9Mz)