

Client Associate

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Company: AllianceBernstein

Location: Taiwan

Category: other-general

SUMMARY:

The objective of this position is to assist the current ABI Sales force in increasing the sales and distribution of AllianceBernstein Mutual Funds and Investment Services in their Regions of operation. **The job duties consist of 50% administrative work and 50% client facing tasks.** The position requires the Client Associate to work in conjunction with Sales team members to form an effective team. Their mission is to develop and increase sales and distribution of AllianceBernstein Mutual Funds and Investment Services and administratively support the Sales Manager(s).

RESPONSIBILITIES:

Coordinate Sales Team's daily activities.

Provide post-sales support using fund updates, manager commentaries, charts, etc.

Provide continual feedback to management on market conditions, distributor and product requests, competitor information and operational or other issues.

Interface between various departments such as Product Development, Legal, Operations and Accounting on issues as they relate to these departments.

Coordinate client meetings in the office. Set up of meeting room/hospitality/material.

Organize distribution of marketing materials for road shows and client meetings/seminars.

Coordinate literature fulfillment office supply and monthly mailing process with Harte-Hanks.

Keep up to date stock of all marketing materials (hardcopy & electronic files) and printed stationary.

Review and coordination of local language and local legal approved required marketing material.

Liaise with regional Operations center to resolve daily and long-term operations issues.

Liaise with regional based Marketing Assistants, the Sales Associates group and internal/external departments involved the coordination of the monthly mailing.

Focus on the development and improvement of the process.

Coordinate local PR requests with PR department and/or Agency.

Prospect for new business and provide sales leads to Sales Manager(s) to increase total assets of the Firm.

Generate daily/monthly sales reports for Sales Manager(s) illustrating breakdown of sales in territory.

Update a contact management system with conversation notes to allow follow up action.

Organize fund managers visits to clients during Road shows.

Develop and nurture existing client relationships.

Present AllianceBernstein and ACM Funds product line in an intelligent manner.

Ensure expedient and accurate resolution of all incoming inquiries by the distributors.

Ensure follow-through and continue communication between AllianceBernstein and the investment community.

Other Tasks as assigned by Sales Manager(s)

JOB SPECIFICATIONS:

Must be a team player and work well with corresponding Sales Team and other members

of different departments.

Must be a good communicator.

A supportive, persuasive telephone manner with clients.

Ability to handle a wide range of questions and small projects.

Must be able to multi-task, be organized and have a good eye for detail.

Should have personal computer skills.

Must be professional, courteous, and flexible always.

Fluent in English and Mandarin.

2 – 3 years of previous fund management product and administrative experience.

Previous Sales / Marketing / Office training or experience would be a plus but not required.

License required.

歡迎身心障礙人士應

Taipei City, Taiwan

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