



Client Relationship Manager

Location: Jersey

The Role

The Client Relationship Manager will support the Wealth Consultants in providing ongoing service and the implementation of new business to Clients of Titan Wealth. The successful candidate will play a central role in supporting the delivery of high-quality financial advice by managing client relationships, coordinating day-to-day service activities, and ensuring administrative and regulatory requirements are met.

Key Responsibilities

- Act as a dedicated point of contact for clients, ensuring a high standard of service is always maintained.
- Build and maintain strong client relationships through regular communication and follow-ups.
- Supporting the Wealth Consultants in preparing client financial plans and suitability reports.
- Respond to client queries efficiently, providing updates on ongoing matters and resolving issues promptly.
- Contribute to internal meetings, team development, and client service initiatives.
- Promoting the profile of the business within the profession and wider communities.

Administrative Support

- Prepare client documentation including onboarding packs, financial reports, and investment proposals.
- Manage the client onboarding process, ensuring all regulatory and compliance checks (e.g., KYC, AML) are completed in accordance with local Financial Services Commission (JFSC) standards.
- Coordinate with product providers and third parties to facilitate new business account openings, transfers, and investment instructions.
- Ensuring that any business conducted is done in a responsible and compliant manner, meeting all legislative requirements, both internally and externally.
- Ensure all client records are accurate, up-to-date, and maintained in line with JFSC regulations and internal policies.
- Monitor and diarise annual reviews, follow-ups, and service-level commitments.

Qualifications & Experience

- Experience in a client-facing role within a financial services or wealth management firm, ideally in Jersey or a similar jurisdiction is preferred but not essential.
- Familiarity with JFSC regulatory requirements and client due diligence processes.
- Strong IT skills, including CRM systems and Microsoft Office suite.

Key Skills & Competencies

- Excellent interpersonal and communication skills, with a client-first mindset.
- High level of accuracy and attention to detail.
- Ability to manage time effectively and prioritise tasks under pressure.
- Professional, discreet, and trustworthy in handling confidential financial information.
- Strong working knowledge of financial products and services including pensions, investments, and protection.

The role holder will keep up to date with legislative and industry changes which affect the business and its clients.

The role holder may from time to time be required to undertake reasonable additional or other duties as is necessary to meet the needs of the business.

Why Join Us?

At Titan Wealth, we believe in empowering our people to make a difference. You'll be part of a close-knit, high-performing team that values integrity, collaboration and strategic thinking. We offer:

- International exposure across key financial jurisdictions.
- Opportunities for career progression and professional development.
- A culture of openness, challenge and continuous improvement.
- The chance to shape the future of risk management in a growing Group.