

SKILLS FRAMEWORK FOR FINANCIAL SERVICES				
SKILLS MAP - ASSISTANT RELATIONSHIP MANAGER/RELATIONSHIP ASSOCIATE				
Sector	Financial Services			
Track	Sales, After Sales, Distribution and Relationship Management			
Occupation	Relationship Manager			
Job Role	Assistant Relationship Manager/Relationship Associate			
Job Role Description	<p>The Assistant Relationship Manager/Relationship Associate supports the acquisition and management of clients including assisting with client on-boarding. He/She helps to facilitate ongoing client support to ensure documents are accurately prepared. He assists the team in ad-hoc information and document collection to ensure that the team can be productive and function efficiently.</p> <p>The Assistant Relationship Manager/Relationship Associate is mature and poised and has good relationship management skills. He is able to take the initiative and learn quickly while on the job. He is a good team player that can collaborate with other team members and business units across the organisation. He has the drive to excel in his role and take on additional responsibilities.</p>			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Key Tasks	Performance Expectations (For legislated / regulated occupations)	
	Support acquisition and management of clients	Complete and maintain account and relationship plans, files and reports	If role is scoped to provide advice directly to customers on investment strategies that cover dealings in securities, futures, collective investment schemes, REITs, funds and/or capital markets, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 1A, 1B, 2A, 3, 4A, 4B, 5, 6, 6A, 8, 8A, 10	
		Participate and assist in market intelligence information gathering		
		Assist with financial analysis of clients to help identify opportunities and risks		
		Assist with business activities by providing support in all phases of client relationship building and account maintenance		
		Ensure timely transaction processing and service delivery of clients' requirements		
		Evaluate client potential through assessment of credit, market/industry, asset and structural risks		
	Support client onboarding	Assist with client on-boarding and compliance checks of clients in adherence with local laws and regulations		
		Perform client due diligence, coordinating with internal and external resources for additional assessments as required		
		Coordinate and collaborate with internal coverage teams and other internal stakeholders		
	Provide ongoing support to clients	Prepare and handle credit applications		
		Understand clients' credit and business models to identify opportunities and risks		
		Assist with preparation of documents for periodic credit review applications		
Assist in credit memo preparation including financial statement spreading and analysis				
Conduct credit reviews on existing corporate borrowers in diversified industries				
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Account Management	Level 2	Communication	Intermediate
	Business Environment Analysis	Level 2	Interpersonal Skills	Intermediate
	Business Negotiation	Level 3	Service Orientation	Intermediate
	Business Opportunities Development	Level 2	Decision Making	Intermediate
	Credit Assessment	Level 2	Problem Solving	Intermediate
	Customer Acceptance Checking and Onboarding	Level 2		
	Customer Experience Management	Level 2		
	Ethical Culture	Level 3		
	Product Advisory	Level 2		
	Regulatory Compliance	Level 3		
	Research and Information Synthesis	Level 2		
	Risk Management	Level 3		

	Sales Strategy	Level 4		
	Stakeholder Management	Level 3		
<b>Programme Listing</b>	For a list of Training Programmes available for the Financial Services sector, please visit: <a href="http://www.skillsfuture.sg/skills-framework/financial-services">www.skillsfuture.sg/skills-framework/financial-services</a>			

The information contained in this document serves as a guide.