

POSITION DESCRIPTION		
Position Title		
Person's Name		
Reports to		
General Description		
Ideal Candidate		Form
Team Responsibilities	System	Links
Embrace the Mission of the business.	<ul style="list-style-type: none"> ▪ Mission Statement. 	System
Understand how we work with and build relationships with our clients.	<ul style="list-style-type: none"> ▪ The Basis of Our Client Relationships. 	System
Adhere to our client service standards.	<ul style="list-style-type: none"> ▪ Client Service Standards. 	System
Professionally handle client queries.	<ul style="list-style-type: none"> ▪ How to Handle Client Queries. 	System
Professionally handle client complaints.	<ul style="list-style-type: none"> ▪ Dealing with Complaints. 	System
Be familiar with Our Firm's Areas of Operation.	<ul style="list-style-type: none"> ▪ Our Firm's Areas of Operation. 	System
Conduct our business in compliance with ethical practices.	<ul style="list-style-type: none"> ▪ Ethics. 	System
Adhere to the Health and Safety Policy.	<ul style="list-style-type: none"> ▪ Health and Safety – How We Do It Here. 	System
Assist in answering incoming telephone calls.	<ul style="list-style-type: none"> ▪ Telephones – Answer Incoming Calls. 	System

Assist in delegation by becoming familiar with the CFAQ system. (Clients Frequently Asked Questions.)	<ul style="list-style-type: none"> ▪ CFAQ Index. 	System
Maintain detailed and accurate time sheets.	<ul style="list-style-type: none"> ▪ Timesheets – Entering Hours Worked. 	System
Individual Responsibilities	Systems	Links
Admin	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Clients	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Finance	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Leadership	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Marketing	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Operational	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System
Team	<ul style="list-style-type: none"> ▪ 	System
	<ul style="list-style-type: none"> ▪ 	System

Performance Measures		Links
Objective	▪	System
	▪	System
	▪	System
	▪	System
	▪	System
	▪	System
Subjective	▪	System
	▪	System
	▪	System
	▪	System
	▪	System

Agreed by: _____
[Name] filling the position Signature Date

Agreed by: _____
[Name] overseeing the position Signature Date