

**Title:** Client Experience Manager (Full-Time)

**Location:** Hybrid, New York City (Midtown).

## The Company

IMTC is a New York City-based fintech company revolutionizing fixed income portfolio management. Its cloud-native platform equips investors managing portfolios for retail and institutional clients with advanced optimization and automation tools, streamlining complex workflows and enabling teams to focus on strategic, high-value decisions.

IMTC brings long-awaited change to fixed income workflows. The platform enables customization on a massive scale allowing firms to grow their businesses and launch new products. By automating manual processes and optimizing decision-making, IMTC helps clients achieve faster, more accurate, and more compliant investment decisions across portfolios, simultaneously.

IMTC provides end-to-end functionality for fixed income teams, including portfolio construction, order management, analytics, reporting, compliance, risk, and live pricing. With managed data services and a broad network of integrations, IMTC centralizes data from leading providers to ensure seamless connectivity. As the only cloud-native platform dedicated to fixed income, IMTC offers unmatched flexibility, scalability, and innovation.

Today, IMTC serves many of the country's leading asset managers, Trust companies, RIAs, Broker-Dealers, and ETF providers.

This is a hybrid position with at least two days a week in the NYC office required.

## The Opportunity

IMTC is seeking a driven and strategic Client Experience Manager to join our fast-growing, innovative team. This is a unique opportunity to contribute meaningfully to a company that is transforming fixed income portfolio and order management. As a key player in our client success efforts, you will serve as a trusted advisor to institutional clients, guiding them through every stage of their journey—from onboarding and implementation to optimization and long-term growth. Your work will directly impact client outcomes, helping them unlock the full potential of IMTC's platform and achieve their strategic investment goals.

In this role, you'll leverage your expertise in fixed income investment management to engage credibly with senior stakeholders, including portfolio managers, traders, and operations leads. You'll lead implementation projects, deliver tailored training, and develop enablement resources that empower clients to maximize the platform's capabilities. By building strong, trust-based relationships and identifying opportunities for deeper engagement, you'll drive client satisfaction and expansion. This position is ideal for someone who thrives in a collaborative, fast-paced environment and takes pride in delivering tangible value to clients and their investors.

## Responsibilities:

- Lead end-to-end consultative onboarding processes including discovery and analysis, implementation, and user enablement.
- Analyze client workflows to identify optimization opportunities and drive adoption of IMTC's platform.
- Build strong relationships with buy-side investment teams through regular check-ins and strategic support.
- Manage stakeholder expectations and ensure timely, high-quality delivery of client outcomes.
- Provide training, perform ad-hoc analysis, and support integration into fixed income workflows.
- Act as the client advocate internally, surfacing feedback and driving product enhancements.
- Identify upsell opportunities and lead commercial conversations by sharing targeted updates on new releases and cross-selling features that align with client goals.
- Develop a strategic understanding of each client's use case and align it with relevant product offerings to drive adoption and usage.

## Qualifications:

- 7+ years of experience in a dedicated client success, account management role, or within fixed income supporting portfolio managers and traders
- Knowledge of financial markets, specifically the bond market, fixed income analytics and risk characteristics are a plus.
- Excellent verbal and written communication skills with very strong attention to detail.
- Ability to present effectively to clients at varying levels of seniority across the organization.
- Advanced knowledge of Microsoft Excel.
- Experience using Salesforce is a plus.

## What we offer:

- Exciting, fast-paced work environment.
- Hands-on experience in a high growth company with a collaborative and team-oriented culture.
- Chance to contribute meaningfully at a pivotal moment in the company's growth.
- Competitive compensation and benefits.

**To apply, please send your resume to [careers@IMTC.com](mailto:careers@IMTC.com).**

*IMTC is committed to ensuring equal employment opportunities for all employees, including qualified employment applicants. The company strives to maintain an environment free of discrimination based on race, color, religion, gender, national origin, ancestry, age, disability, genetic information, military or veteran status, marital status, sexual orientation, citizenship, or any other protected category or characteristics as defined by federal, state or local laws. This equal employment opportunity policy applies to all employment practices, including but not limited to recruiting, hiring, advertising, promotion, transfer, reductions in force, social and recreational programs, training, employee development, compensation and fringe benefits, discipline, and termination.*

