Title: Client Experience Manager

Location: Hybrid, Midtown Manhattan (2 days/week)

Type: Full-time

The Company

IMTC delivers the operational infrastructure and intelligence fixed income managers need to optimize across accounts, execute with precision, and scale with confidence.

Fixed income is one of the largest asset classes in the world and one of the least modernized. Many firms still run bond portfolios on a combination of spreadsheets and legacy systems that were built decades ago. IMTC replaces those tools with intelligent optimization and automation that empower investment managers to act on thousands of accounts simultaneously, with the accuracy and audit trail that compliance teams and regulators demand.

Our clients are buy-side managers running municipal and taxable fixed income using IMTC to scale operations, launch new products, and grow revenue without adding headcount. They manage hundreds, often thousands, of separately managed accounts. Every account carries its own guidelines, tax profile, state preferences, credit limits, and client restrictions. Equity-first solutions were never built for that complexity, and it caps how many accounts they can take on and how fast they can grow.

IMTC is the only cloud-native platform built exclusively for fixed income. One hub covers portfolio construction, optimization, order management, pre-trade compliance, analytics, risk, reporting, and live pricing. Managed data services and a broad network of integrations keep every input connected. The result: our clients grow their books without growing their teams, launch new products faster, and make sure every trade is compliant before it executes.

IMTC supports many of the country's leading asset managers, RIAs, trust companies, broker-dealers, and ETF providers that together oversee more than $11 trillion in assets. Clients include T. Rowe Price, Franklin Templeton, Lord Abbett, and Guggenheim Partners.

The Opportunity

We are looking for a Client Experience Manager who doesn't wait to be told what to do. You see a broken workflow and fix it. You spot a client who could get more from the platform and you make it happen.

You will own the relationship with municipal and taxable fixed income teams from day one. That means leading onboarding and implementation, getting PMs, traders, and operations leads live on the platform and maximizing their value on an ongoing basis. Your voice will carry real weight here. What you hear from clients will shape our roadmap, our processes, and how we grow. Every client you take on is a long-term partnership,

and the trust you build will show up directly in renewals, expansion, and the referrals that bring in our next clients.

This is not a ticket-queue support role. It is a seat for someone who wants ownership, moves fast, and measures success by the change they create for clients and for the business. In your first 90 days, you will learn the platform inside out, take ownership of a set of client relationships, ultimately leading up to your first client onboarding.

Responsibilities:

- **Own onboarding end to end.** Partner with our project management team to lead discovery, map how each muni and taxable desk actually works today, and guide the client through implementation, including configuring account guidelines, restrictions, and pre-trade compliance rules, through to confident daily use.
- **Rethink client workflows.** Find where PMs and traders lose time to manual rebalancing, tax-lot decisions, state-specific muni constraints, or compliance checks, and show them a better way on IMTC.
- **Be the trusted voice on the desk.** Build real relationships with portfolio managers, traders, and operations leads through regular check-ins, both virtual and in person, and hands-on strategic support.
- **Deliver results on time.** Set clear expectations with stakeholders and hold yourself accountable for outcomes like time to go-live, adoption, and retention, not activity.
- **Train, analyze, and integrate.** Run tailored training, perform ad-hoc analysis, and help ensure clients wire IMTC into their custodians, data providers, and downstream systems.
- **Advocate for your clients.** Bring client feedback to product and engineering with a point of view, and champion the enhancements that matter most.
- **Grow every account.** Spot expansion opportunities, lead commercial conversations, and connect new releases to the goals each client is chasing.
- **Know every client cold.** Understand each firm's process, strategies, and growth plans well enough to recommend what they need next before they ask.

Qualifications:

- 7+ years in client success, account management, or a fixed income role, with direct experience in portfolio management and trading.
- Working knowledge of municipal and taxable bond markets. Familiarity with fixed income analytics, risk characteristics, and SMA workflows is a strong plus.
- A self-starter's drive. You take ownership, act without being asked, and follow through until the problem is solved.
- Clear, confident communication in writing and in the room, with sharp attention to detail.
- Comfort presenting to everyone from operations analysts to CIOs.
- Experience leading software onboarding or implementation projects for buy-side or wealth management clients.
- Advanced Excel skills, including lookups, pivot tables, and working with large account-level data sets.

- Salesforce experience is a plus.

What We Offer

- Real ownership and the authority to change how we serve clients.
- A fast-moving, collaborative team that rewards initiative.
- A front-row seat as IMTC reshapes how fixed income is managed.
- Direct access to leadership and colleagues who have sat on the buy-side.
- A clear path to grow into a leadership role as our client base expands.
- Deep exposure to how leading asset managers run fixed income, from the PM seat to the trading desk.
- An opportunity to push the industry forward, with an AI forward platform
- Competitive salary and benefits including healthcare, dental, and vision coverage, a 401(k) match, unlimited PTO, and other competitive perks.

How to Apply

Send your resume to careers@IMTC.com with a few sentences on how you would be a good fit for the role.

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, sex, gender identity or expression, 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.