

Business Support Role in Financial Services

OVERVIEW OF ROLE

- To work in the operations team to support maximising back-office system functionality across the company with a focus on our back-office system, Intelliflo.

PERSON SPECIFICATION

- *Experience working in a regulated or professional environment*
- *Willingness to work hard and have a 'can do' attitude*
- *Team working and flexibility*
- *Strong verbal and written communication skills*
- *Knowledge of Microsoft systems, including word, excel and PowerPoint*
- *A strong interest in processes, systems, and process improvement*
- *Ability to adapt to new technology and ways of working digitally*
- *IT literacy and ability to work with third party systems and insurer systems*
- *Attention to detail and accuracy and ability to proof check your work and others*
- *Ability to understand and adhere to regulatory requirements and internal policies*
- *Methodical and organised working practices enabling deadlines to be met*
- *Experience of working within a team, prioritising, and tasking work*
- *Relishing a challenge and learning new skills*
- *Always behaving in a professional manner both in the office and with visitors*

KEY RESPONSIBILITIES

- Creating, maintaining and developing a range of simple and complex templates and workflows in our back-office system, Intelliflo
- Working within a small team to develop further capabilities of our back-office system, Intelliflo predominantly
- Maintaining accurate back-office systems utilising bulk uploaders or manual input
- Conducting a range of regular and ad hoc data analysis and reporting requirements
- Supporting the running of key business systems, including DocuSign, Smart Search, Egress (Secure email)
- Involvement in several projects to support enhancing the services delivered to clients
- Running a range of reports for the team and exception reporting and data analysis for data integrity
- Supporting the team with basic IT queries or colleagues with the roll out of new systems
- Involvement with a range of ad hoc and general tasks which all help enable the wider team to provide a best-in-class service to our clients

MAIN CHALLENGES

- *Learning our back-office system Intelliflo and other systems*
- *Learning what we do and the data we capture and how these feeds into systems and MI*
- *Managing the volume and prioritisation of work*
- *Ability to manage and organise your work and excellent attention to detail*

- *Completing all work to a high standard, which in turn enables delivery of a higher standard of service than competitors to retain clients and exceeding the expectation of new clients*

OPPORTUNITIES – BECKETT ACADEMY

Becketts is passionate about supporting its staff to learn and develop to enable them to achieve career aspirations. Our Academy supports individuals with both technical and non-technical training along with a wealth of learning within your role day to day.

We promote professional qualifications for all staff. Becketts fund study books and exams and you have allocated study time each week. Through the Academy a study plan is developed to help you stay on track and achieve goals.

LOCATION AND HOURS

At our head office in Bury St Edmunds. Working week – 36.25 hours, Monday - Friday 8.45 am – 5pm.

BECKETT FINANCIAL SERVICES LIMITED

We are recognised as one of the largest independent regional advisers. For over 35 years, our specialist teams have supported our clients in the construction of sound financial plans for their families or their businesses alike; enabling them to make financial planning decisions based on the advice we have provided them.

We hold the accreditation of Corporate Chartered Financial Planners from the Chartered Insurance Institute. This, the most prestigious award in the profession, is only awarded to those firms with a proven record in providing the highest level of service to their clients, demonstrating a culture of integrity, as well as the attainment of and commitment to the Chartered Insurance Institute’s professional qualifications.

CONTACT INFORMATION

If you are interested in this role, please contact Lesley Delaney

EMAIL: lesley.delaney@beckettinvest.com or PHONE: 01284 754500

Training

- All professional exams paid for
- Personal Study Plans for CII professional qualifications
- Paid study leave
- Study books and resources paid for

Benefits

- 29 days holiday + offices closed between Christmas and New Year + Birthday day-off
- 5% of salary pension contribution
- Flexible working
- Profit share
- Social events
- Free parking
- Free drinks
- Free fruit
- Cycle to Work scheme
- Length of service recognition
- 15% off legal services
- £1,000 bonus for staff who recommend individuals who join Becketts

Insurance

- Life cover
- Income protection scheme
- Healthcare cash plan
- Subsidised private healthcare
- Employee assistance programme

Values

Great Place To Work
MENTAL HEALTH AT WORK COMMITMENT

Accredited B Corp

Certified B Corporation
 This company meets the highest standards of social and environmental impact