BECKETTS

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

PERSONAL FINANCIAL PLANNING, EMPLOYEE BENEFITS AND WEALTH MANAGEMENT

Client Servicing Role in Financial Services

OVERVIEW OF ROLE

To provide administrative support to the Private Client Advisers and Directors so they can focus on their role and provide a high standard of service to clients and to provide additional support to the wider team.

PERSON SPECIFICATION

- *Willingness to work hard and have a 'can do' attitude*
- *Experience working in a regulated or professional environment*
- *Strong verbal and written communication skills*
- *Ability to understand and adhere to regulatory requirements and internal policies*
- *IT literacy and ability to work with a number of systems and insurer/provider systems*
- *Attention to detail and accuracy and ability to proof check your work and others*
- *Team working and flexibility*
- *Methodical and organised working practices enabling deadlines to be met*
- *Experience to work within a team and able to prioritise and juggle work by liaising with colleagues*
- *Ability to adapt to new technology and ways of working digitally*
- *Taking an interest in processes and systems and feeding back where a process could be developed or improved*
- *Behaving in a professional manner at all times both in the office and with clients*

KEY RESPONSIBILITIES

- Client Servicing – liaising with insurers/providers and third parties, providing information and updating systems
- Back-office system Intelliflo – updating various aspects of the system ensuring client records are accurate
- Client Review Meetings – preparing packs for the advisers which combines various reports and documents being generated from our back-office system, as well as insurer/provider sites. In addition, checking client holdings and system held records which will further define the review pack enclosures
- Maintaining a clear audit trail within the back-office system and keeping colleagues updated with progress reports
- Client Review Meetings – involvement with post review work, including checking and formatting meeting notes, following through on some client actions, updating our back-office system and insurer/provider systems
- Creating client records and inputting fact find information, including querying input with advisers to ensure our records are 100% accurate
- Supporting colleagues with a range of ad hoc and general tasks which help enable the wider team to provide a best-in-class service to our clients

MAIN CHALLENGES

- Learning and understanding financial services terminology
- Managing the volume and prioritisation of work
- Ability to manage and organise your work and excellent attention to detail
- Delivering 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 main 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
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