PERSONAL FINANCIAL PLANNING, EMPLOYEE BENEFITS AND WEALTH MANAGEMENT

Consultant Support Role in Financial Services

OVERVIEW OF ROLE

To provide high quality administrative support to the advisory team enabling a high standard of service to be delivered to our clients. You will be working to support a small number of advisers, or aligned to one adviser to provide lead support.

PERSON SPECIFICATION

We would expect you to have previous experience working in a professional firm, and ideally within financial services. You may already have or be studying for relevant professional qualifications

- *Willingness to work hard and have a 'can do' attitude*
- *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 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*
- *Always behaving in a professional manner both in the office and with clients*

KEY RESPONSIBILITIES

CLIENT SERVICING

- Liaise with clients, dealing with queries and servicing requirements.
- Preparing packs for client review meetings including generating schedules from the back-office system (Intelliflo), cash flow, analytics graphs and completing other checks
- Completing post meeting actions and conduct various housekeeping checks
- Undertake specific tasks, e.g., annual ISA utilisation project for clients, CGT reporting

NEW BUSINESS

- Arranging completion of policy analysis, liaising with providers capturing a full audit history of information provided and transposing onto policy analysis summaries
- Collating documents, drafting suitability letters and increment letters
- Generating in house cash flow reports

PLATFORMS AND PROVIDERS

- Working with platforms and providers to generate wizards for new instructions and account changes to ensure clients' holdings are correctly actioned, monitored and managed
- Work with providers to make sure information and documentation is made available at the correct time

PRODUCT AND TECHNICAL KNOWLEDGE

- CPD requirements are exceeded by undertaking regular learning and reading
- Regular training on provider systems and changes in legislation
- Annual testing to ensure core competence is maintained

MAIN CHALLENGES

- 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 achieve their career aspirations. Our Academy supports individuals with both technical and soft skills training and a wealth of learning within your role day to day.

We promote professional qualifications for all staff, e.g., through The Chartered Insurance Institute who support the wider financial services industry. Becketts fund study books and exams and you'll have allocated study time each week. Through the Academy a study plan is developed to help you stay on track and achieve your goals.

LOCATION AND HOURS

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

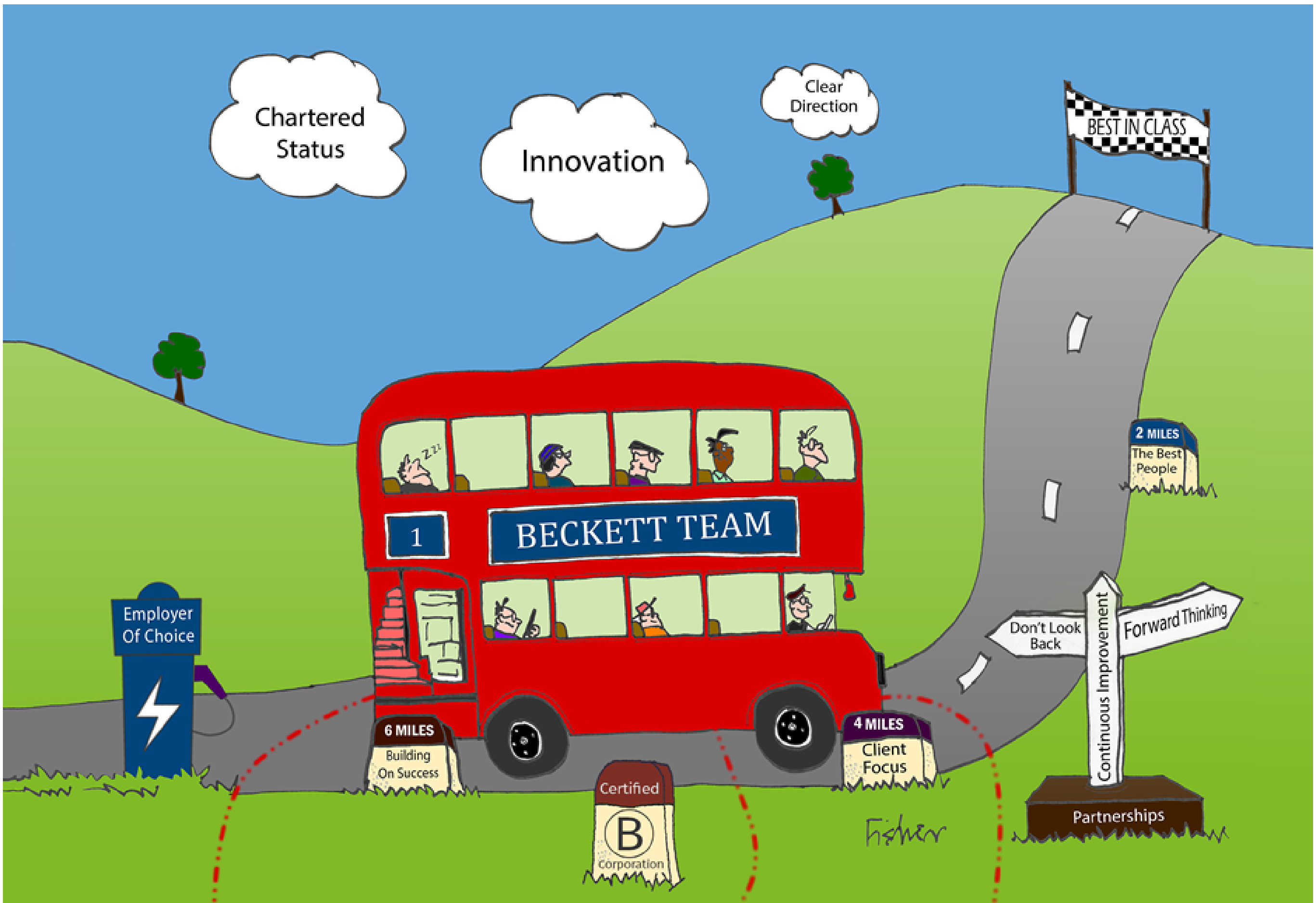
BECKETT FINANCIAL SERVICES LIMITED

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
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. Certified OCT 2022-OCT 2023 UK

MENTAL HEALTH AT WORK COMMITMENT

Accredited B Corp

Certified B Corporation

This company meets the highest standards of social and environmental impact