BECKETTS

PERSONAL FINANCIAL PLANNING, EMPLOYEE BENEFITS AND WEALTH MANAGEMENT

Senior Consultant Support - Employee Benefits

OVERVIEW OF ROLE

You will be responsible for providing administration and general support to an Employee Benefits Consultant/s in the day to day running of client accounts across a range of pensions and group risk. Covering the full breadth of employee benefits services, mainly covering group personal pensions, with knowledge of automatic enrolment and salary exchange plus Group Risk products. In addition, knowledge of PMI and cash plans would be beneficial.

PERSON SPECIFICATION

We would require you to have previous financial services experience, and specifically strong group pensions knowledge. You may well hold professional qualifications (R01, GR1, R05) although this is not essential you would be required to work towards these.

- ✓ Willingness to work hard and have a 'can do' attitude
- ✓ Learn about healthcare, auto enrolment pensions and group risk products from day-to-day learning and additional reading
- ✓ Commitment to study for professional qualifications
- ✓ Manage the volume and prioritisation of work, and deliver a higher standard of service than competitors to retain clients and exceed the expectations of new clients, which includes:
    - Understanding of, and adherence to, regulatory requirements and internal policies
    - Delivery of high levels of customer service
    - Attention to detail and accuracy
    - Strong verbal and written communication skills
    - Team working and flexibility
    - Methodical and organised working practices to meet deadlines
    - IT literacy, especially company specific software and Microsoft products

KEY RESPONSIBILITIES

You will co-ordinate and undertake all administration in relation to the schemes including updating member data, renewals, claims data, communication materials, governance meetings and other associated queries.

Administering a portfolio of clients in respect of their Group Risk contracts including Group Life, Group Income Protection and Group Critical Illness Schemes.

As a senior Group Pensions & Group Risk Administrator you will be responsible for providing pro-active administration support to the Consultant in order to retain and expand existing client accounts and to help develop new business.

You will liaise with insurers to negotiate preferred terms, attend client meetings and draft recommendation reports. You will have excellent verbal and written communication skills, attention to detail, a reliable working attitude and a professional client focussed approach with experience of dealing with a range of SME and Corporate clients.

MAIN CHALLENGES

- Learning the back-office system Intelliflo and other systems and insurer sites
- 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.

For this role we would expect you to hold or be studying for relevant professional qualifications.

LOCATION

Our main office is in Bury St Edmunds, but this role would be based from our Norwich Office, supporting the wider team members at our other locations. Working week - 35 hours, Monday - Friday 9 am – 5pm.

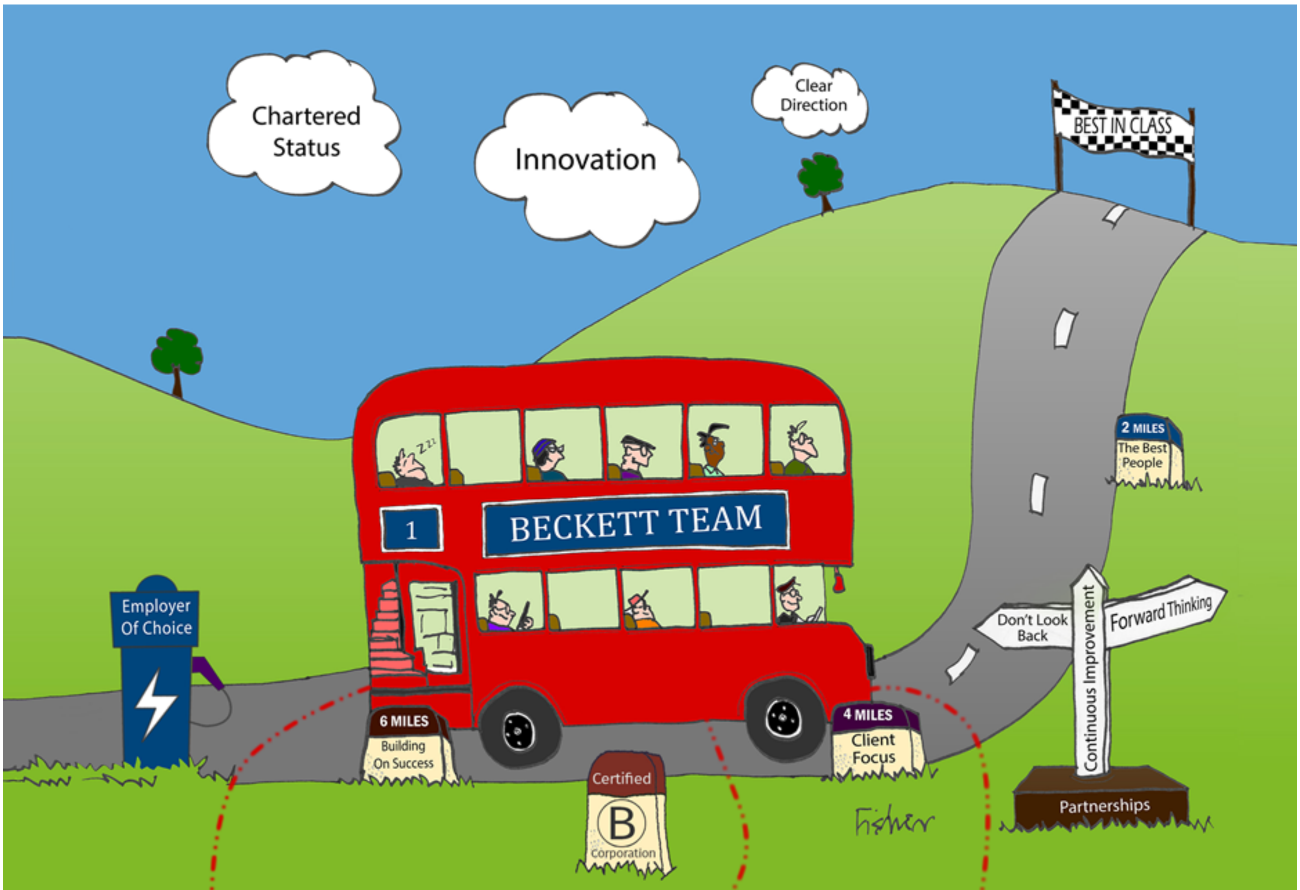
BECKETT FINANCIAL SERVICES LIMITED

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 Karen Hubbard:
EMAIL: karen.hubbard@beckettinvest.com or PHONE: 01284 773762



Training

All professional exams paid for

Personal Study Plans for CII professional qualifications

Paid study leave

Study books and resources paid for

Values

Great Place To Work. Certified OCT 2022-OCT 2023 UK

MENTAL HEALTH AT WORK COMMITMENT

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

Accredited B Corp

Certified B Corporation

This company meets the highest standards of social and environmental impact