

## Team Support Role in Financial Services

### OVERVIEW OF ROLE

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To provide administrative support, primarily to the Private Client team, but also general support to the office as required

### PERSON SPECIFICATION

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- ✓ Willingness to work hard and have a 'can do' attitude
- ✓ Commitment to study for professional qualifications (via the Chartered Insurance Institute CII).
- ✓ 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
  - Ability to adapt to new technology and ways of working digitally
  - Behaving in a professional manner at all times both in the office and with clients

This is an entry level role and whilst some previous work experience is beneficial, it is not a requirement

### KEY RESPONSIBILITIES

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- Client Servicing – liaising with insurers and third parties, providing information and updating systems
- Back-office system (Intelliflo) – updating various aspects of the system ensuring client records are accurate
- Maintaining a clear audit trail within the back-office system and keeping colleagues updated with progress reports
- Creating client records and inputting fact find information, including querying input with advisers to ensure our records are 100% accurate
- Scanning to our document management system and electronic filing
- Issuing client policy information request letters and collating responses
- Input details to IO (back-office system) from client fact finds
- Preparing specific elements of client review packs including client schedules
- Providing occasional cover for reception
- Assisting with some basic IT queries
- Supporting colleagues 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

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- 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

EMAIL: [lesley.delaney@beckettinvest.com](mailto:lesley.delaney@beckettinvest.com) or PHONE: 01284 754500

**Chartered Status**

**Innovation**

**Clear Direction**

**6 MILES** Building On Success

**4 MILES** Client Focus

**2 MILES** The Best People

**Don't Look Back**

**Forward Thinking**

**Partnerships**

**Employer Of Choice**

**1**

**BECKETT TEAM**

**Best in Class**

**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**

**MENTAL HEALTH AT WORK COMMITMENT**

**Accredited B Corp**

**Certified Corporation**

**This company meets the highest standards of social and environmental impact**