



# BECKETT

## FINANCIAL SERVICES



**JOB TITLE:** Consultant Support (Employee Benefits)

**DATE:** 1 April 2023

**REPORTS TO:** Team Manager

**LINE MANAGER:** N/A

### PURPOSE OF ROLE

- To undertake a lead support role to the Employee Benefits Consultants and Directors to ensure clients receive a consistent high level of service and support
- To ensure that client records are up to date and that internal systems and processes are followed
- Support and develop junior team members to enable them to be as efficient and effective as possible

### KEY RESPONSIBILITIES

- Ensure a clear audit trail is maintained for all client records
- Ensure timely delivery of employee benefits scheme processing for group risk, group private medical insurance and other schemes/policies as required
- Provide administrative support for new, existing and complex schemes
- Manage Auto-Enrolment compliance for all pension schemes
- Manage annual renewal and market reviews for all existing group risk schemes
- Prioritise and process claims and keep client and consultant up to date with progress
- Ensure bespoke compliance documents are accurate and up to date
- Process monthly payments, ensuring that the contributions are correct
  - Organise and prepare for client governance and pre-renewal meetings
- Complete follow-up actions from client meetings in line with instructions from consultant, liaising with both client, insurer and pension provider as required
- Check and issue policy documentation
- Assist clients with the implementation of Employee Assistance programmes
- Prepare Employee Announcement Letters for new and existing schemes
- Keep Corporate Spreadsheet up to date
- Draft proposition documents, reports and presentations for consultants
- Provide feedback to consultants, keeping them up to date
- Ensure IO is up to date and opportunities are added and maintained regularly and correctly, in consultation with the Employment Benefit Consultant/Director
- Liaise with consultants and clients to ensure all contractual obligations are fulfilled
- Support, train and develop junior team members to enable them to undertake tasks that will benefit the team and ultimately the client
- Undertake project activity to ensure the efficient running of the office e.g. streamlining processes and documents, create framework for checking work, ensure templates/documents are correct and in the right place, workflow management.
- Maintain and update my talent development record, via the Beckett Academy App, ensuring my objectives are up to date and impact of any training is recorded

## PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"><li>● R01 Commercial awareness Regulation and Ethics</li><li>● GR1 Group Risk</li></ul>	<ul style="list-style-type: none"><li>● R04 Pension and Retirement Planning</li><li>● Progressing towards the Diploma in insurance</li></ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"><li>● Good understanding of Becketts' systems and processes for EB Providing accurate and timely administration support</li></ul>	<ul style="list-style-type: none"><li>● Development of others</li></ul>
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"><li>● Mandatory compliance training group</li><li>● Knowledge of pensions, group risk and healthcare, group pensions administration, automatic enrolment duties, group life, group income protection and group critical illness schemes and employee assistance programmes</li><li>● Business protection</li><li>● Insurer offers</li><li>● Pension provider systems</li></ul>	<ul style="list-style-type: none"><li>● Knowledge of products and services Becketts advise on</li><li>● IO</li></ul>
<b>SKILLS &amp; ABILITIES</b>	<ul style="list-style-type: none"><li>● Attention to detail/accuracy</li><li>● Computer literate and data management</li><li>● Analytical</li><li>● Good organisation and prioritisation skills</li><li>● Time management</li><li>● Team working</li><li>● Ability to build and maintain relationships</li><li>● Communication – written and verbal</li><li>● Ability to follow rules and procedures</li></ul>	
<b>PERSONAL ATTRIBUTES</b>	<ul style="list-style-type: none"><li>● Behaving in a professional manner</li><li>● Trust and integrity</li><li>● Curiosity and willingness to learn and improve</li></ul>	<ul style="list-style-type: none"><li>● Commercial awareness</li></ul>

## KEY PERFORMANCE INDICATORS

- ✓ Accurate and timely information provided
- ✓ IO and Corporate Spreadsheet accurate and up to date
- ✓ Building client relationships
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues
- ✓ Adherence to procedures
- ✓ Task management (diary)

## MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work
- Delivering a higher standard of service than competitors to retain clients and exceed the expectations of new clients

## SIGNATURE

I agree to the above description of my responsibilities.

### ***JOB HOLDER:***

Signature:

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Print Name:

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Date:

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