

JOB TITLE: Team Support **REPORTS TO**: Senior FP Support/Team manager DATE: 1 April 2023 LINE MANAGER: N/A

PURPOSE OF ROLE

- To provide administrative support to the private client team, to ensure that they have timely and accurate information
- To ensure that client records are kept fully up to date with all related correspondence uploaded and correct indexing to appropriate systems

KEY RESPONSIBILITIES

- Input fact find details onto IO
- Undertake scanning and ensure information is saved in the right place
- Collate information and prepare client review meeting packs
- Input and analyse completed risk profile questionnaires
- Undertake post review work in accordance with the checklist
- Liaise with the team regarding reviews that are due each month and keep opportunities up to date
- Complete anti money laundering checks via Smart Search for individuals and companies house for corporate clients
- Generate policy information request letters for letters of authority and change of agency and send to providers. Set up the event list and analysis sheet
- Complete Policy analysis
- Provide general administrative support to private client team members e.g. post
- 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

ESSENTIAL

QUALIFICATIONS

• N/A

EXPERIENCE

DESIRABLE

- Progress towards the Diploma in Financial Planning
- Providing accurate and timely administrative support

KNOWLEDGE	Mandatory compliance training	 Knowledge of pensions and investments
SKILLS & ABILITIES	 Attention to detail/accuracy Computer literate and data management Analytical Good organisational and prioritisation skills Time management Team working Ability to build and maintain relationships Communication – written and verbal Ability to identify and raise any issues or errors Ability to follow rules and procedures 	
PERSONAL ATTRIBUTES	 Behaving in a professional manner Trust and integrity Curiosity and willingness to learn and improve Willing to help and support the wider Becketts team e.g. covering reception/IT queries 	

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues

MAIN CHALLENGES OF THE ROLE

• Manage the volume and prioritisation of work

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date: