



JOB TITLE: Team Support

DATE: 1 April 2023

REPORTS TO: Senior FP Support/Team manager

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

DESIRABLE

- Progress towards the Diploma in Financial Planning

EXPERIENCE

- Providing accurate and timely administrative support

KNOWLEDGE	<ul style="list-style-type: none"> • Mandatory compliance training 	<ul style="list-style-type: none"> • Knowledge of pensions and investments
SKILLS & ABILITIES	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Mentoring • Ability to work pro-actively and on own initiative • Creativity and innovation
PERSONAL ATTRIBUTES	<ul style="list-style-type: none"> • 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: