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| RoleClient Relations Support | Role Holder | Reports toOperations Manager | Direct ReportsN/A |
| **Purpose of the role**: To provide administration support to the business. |

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| **Deliverables** |
| * To act as a point of contact via telephone to external calls
* Liaise with advisers, product providers and clients via telephone, letter and email on associated administration
* Proactively participate in team meetings and agree and complete actions where required
* Ensure workflow is completed in a timely manner
* Scan and link relevant documentation onto the company back office system
* Support the New Business process where needed in a compliant and professional manner either manually or online
* Track progress of business with product provider and liaise with advisers as appropriate
* Processing general administration requests within service levels
* Obtaining and preparing documentation in preparation for the advisers meetings with clients (this could include; client packs, valuations, reports and illustrations)
* Deal with daily servicing post and update company systems as appropriate
* Action daily “tasks” in accordance with Company Standards.
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| **Critical Competencies (skills and abilities needed for the role)** |
| * Work well within a team environment and under own initiative
* Proficient use of Microsoft office
* Good attention to detail with accuracy.
* Ability to work in an organised manner to tight deadlines.
* Flexible in working approach
* Good written and verbal communication skills
* Ability to take responsibility and ownership
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| **Experience (Relevant for the role)** |
| * working in a Financial Services office providing administration
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| **Core Values (that we live by in the business)** |
| **Be humbly confident valuing yourself and others** * Communicate clearly. Do not make assumptions or take things for granted.
* We are privileged to work closely with our clients, they are always our number one priority.
* If something goes wrong, fix it and improve next time. No blame.

**Question and listen carefully, to understand*** Be genuinely interested in clients and colleagues.
* Don’t be afraid to ask more questions to gain the best possible understanding.
* Listen, understand and do not jump to conclusions.

**Be honest, open and respectful*** Treat other as you would want to be treated yourself.
* Work to maintain an open and honest environment.
* Listen to each other’s views and opinions, whilst feeling comfortable in questioning different ideas.

**Take enjoyment from energy and empowerment*** Have energy and enthusiasm in what you do.
* Be accountable and feel empowered to make a difference.
* Enjoy the motivation of a client-focused business.

**Hunger to change and improve** * Do not be afraid of change.
* Continually look for ways to improve our service, processes and communications.
* Use your initiative and be prepared to move out of your comfort zone to deliver better outcomes for our client.
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