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| Role  Senior Client Relations Support | Reports to  Operations Manager | Direct Reports  N/A |
| **Purpose of the role**: To provide administration support to external and internal customers | | |

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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 (Intelligent Office) * 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. |
| **Critical Competencies (skills and abilities needed for the role)** |
| * Work well within a team environment and under own initiative * Proficient use of Microsoft office * Proficient use and confidence of using IO * Clear understanding of using Wrap platforms i.e Standard Life and AJ Bell * 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)** |
| * 2 years working in a Financial Services office providing administration |
| **Core Values (that we live by in the business)** |
| Be humbly confident valuing yourself and others (+)   * Working with client, not taking things for granted we are privileged, no assumptions * Our clients are our number one * Clear communications * If something goes wrong, any issues – no blame be solution focused   Question and listen 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 no jumping to conclusions   Be honest, open and respectful (+)   * Treat other as you would want to be treated * Working in an open environment * Listen to each other’s views and opinions, whilst feeling comfortable in challenging the norm   From energy and empowerment comes enjoyment (+)   * Enjoy the motivation of the business * Be accountable and empowered to make a different * Be open and honest in your communications internally to support one another   Hunger to change and improve (+/-)   * Challenge the norm for better outcomes * Look for process improvement * Use your initiative and be prepared to come out of your comfort zone to deliver better |