

Role title: Client Services Administrator

Job purpose:

To assist in the running of the back office functions of the business in such a way as to ensure that the firm's client and service propositions are delivered in an efficient and robust way, whilst maintaining high levels of operational effectiveness.

Relevant Skills and Knowledge:

- Ability to communicate at all levels via written media.
- Quick learner, able to take on and understand the environment we operate in
- Numerate and comfortable with basic accounting principles
- Business support experience within a service focused firm
- Generally IT literate
- Excellent attention to detail

Key responsibilities and accountabilities:

- Ensure that all client records, electronic or paper based, are maintained and accurately updated
- Ensure the client and service propositions are being delivered and implemented in line with timeframes
- Manage the process and delivery of client service standards in the following areas:
 - Maintenance of client records on Intelliflo/Money Info
 - Timely delivery of suitability reports
 - Submission of new business
 - Delivery of annual review process, including:
 - Research template and production of Annual Charges Declaration
 - production of Pre Meeting Review letter, including top up/CGT/wrapper change recommendations if required
 - updating Fact Find information on IO and CashCalc
 - production of Post Review Letter and Cash Flow document

Key performance metrics

- Minimal errors
- Delivery of efficient review process to meet client service standards and TCF standards
- Development of strong client relationships
- Intelliflo/Money Info “expert”

Required Attributes

The successful candidate will:

- Be hard working, committed and positive
- Be a self starter and manage own work flow
- Be ready for any challenge
- Be willing to progress their knowledge further either via Financial Services qualification and/or business management qualifications
- Have experience of working in a financial services/client service environment
- Have experience of a variety of back office systems
- Be IT literate
- Be able to manage a variety of personalities with good humour and sensibility