



Dettingen House
Dettingen Way
Bury St Edmunds
Suffolk
IP33 3TU

01284 754500
info@beckettinvest.com
www.beckettinvest.com

Team Support Role in Financial Services

OVERVIEW OF ROLE

To provide administrative support, primarily to the Private Client team, but also general support to the office as required.

GENERAL DUTIES

- Scanning to document management system and client filing
- Generate policy info request letters for letters of authority and change of agency
- Complete post meeting review and post new business updates
- Input Fact Find details to IO (back office system), generating a new, accurate Fact Find for the client file
- Complete corporate anti money laundering checks
- Ensuring the team has sufficient applications and literature supplies printed
- Update IO (back office system) with valuations and transfer of agency notifications
- Assist Investment Team with issuing of quarterly valuations (printing and franking)
- Undertake specific tasks, eg ISA utilisation project, IO Opportunity Reporting
- Provide cover to the receptionist
- Assisting with some basic IT queries
- Processing work in a timely manner and clearly prioritising work between Tasks, Email, Post, Reviews, phone calls and consultant requests
- Circulating outstanding client reviews to the team

KEY SKILLS REQUIRED

- ✓ Willingness to work hard and have a 'can do' attitude
- ✓ Commitment to study for professional qualifications (via the Chartered Insurance Institute CII).
- ✓ Manage the volume and prioritisation of work, and deliver a higher standard of service than competitors to retain clients and exceed the expectations of new clients, which includes:
 - Understanding of, and adherence to, regulatory requirements and internal policies
 - Delivery of high levels of customer service
 - Attention to detail and accuracy
 - Strong verbal and written communication skills
 - Team working and flexibility
 - Methodical and organised working practices to meet deadlines
 - IT literacy, especially company specific software and Microsoft products

OPPORTUNITIES

The individual will have the opportunity to progress in their career through Consultant Support roles, Para-planning roles and beyond. This will be supported with funded study for industry recognised qualifications.

WORKING WEEK

37.50 hours, Monday - Friday 8.45am – 5pm.

WHY BECKETT'S IS AN EMPLOYER OF CHOICE

Training

All professional exams paid for
Personal Study Plans for CII professional qualifications
Paid study leave
2 hours weekly office study
Study books and resources paid for

Benefits

25 days holiday + Bank Holidays + offices closed between Christmas and New Year
4% of salary pension contribution
Profit share
Perkbox - Employee reward scheme
Social events
Free parking
Free drinks
Free fruit
Great communications
Length of service recognition
15% off legal services
£1,000 bonus for staff who recommend individuals who join Becketts

Insurance

Life cover
Income protection scheme
Healthcare cash plan
Subsidised private healthcare
Employee assistance programme

Employer Awards



Winner of Small Business Award for Suffolk



Modern Offices

BECKETT FINANCIAL SERVICES LIMITED

We are recognised as one of the largest independent regional advisers. For nearly 30 years, our specialist teams have supported our clients in the construction of sound financial plans for their families or their businesses alike; enabling them to make financial planning decisions based on the advice we have provided them.

We hold the accreditation of Corporate Chartered Financial Planners from the Chartered Insurance Institute. This, the most prestigious award in the profession, is only awarded to those firms with a proven record in providing the highest level of service to their clients, demonstrating a culture of integrity, as well as the attainment of and commitment to the Chartered Insurance Institute's professional qualifications.

CONTACT INFORMATION

If you are interested in this role, please contact Lesley Delaney:
EMAIL: Lesley.Delaney@beckettinvest.com or PHONE: 01284 773753