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Employee Benefit Trainee Account Manager

OPPORTUNITY

This is an opportunity to join a prestigious financial services company at our head office in Bury St Edmunds. You will have a clear route into an advisory role if you have the desire to work hard and develop.

With support in the role and with professional qualifications, you will need to demonstrate solid communication skills, the highest levels of professionalism and the ability to produce top quality work, enabling an excellent client service to be delivered.

OVERVIEW

- Work within the Employee Benefit team for 12 months, you will learn the support role alongside our Employee Benefit consultants. During this time, you will learn how Group Personal Pensions and Master Trusts work and gain a good working knowledge of Group Risk products, business protection and other areas.
- After 12 months, you will have the opportunity to move into the Account Manager role which will include delivering a financial planning service to a number of nominated Employee Benefit clients. This role will then develop to include conducting employee clinics and assisting with client presentations.

KEY COMPETENCIES

GENERIC	JOB SPECIFIC
<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Correct level of professional qualifications to fulfil the job requirements• Ensuring continuous learning keeps technical and legislation knowledge up to date• Commercial awareness• Acceptable standards of business correspondence in all formats

WORKING WEEK

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

BECKETT FINANCIAL SERVICES LIMITED

We are recognised as one of the largest independent regional advisers. For over 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

WHY BECKETTS IS AN EMPLOYER OF CHOICE

Training

- All professional exams paid for
- Personal Study Plans for CII professional qualifications
- Paid study leave
- 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
- Social events
- Free parking
- Free drinks
- Free fruit
- Cycle to Work scheme
- Statutory Maternity & Paternity leave
- 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






Modern Offices