BECKETT FINANCIAL SERVICES
EXPERIENCE TRUSTED RESPONSIBLE

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
- Issue client policy information request letters and collate responses
- Update various systems with information after client meetings
- Input details to IO (back office system) from the client fact finds
- Ensuring the team has sufficient applications and literature supplies printed
- Update IO (back office system) with policy valuations
- Assist Investment Team with issuing of quarterly valuations
- Undertake specific tasks to support the team
- Provide cover to the receptionist
- Assisting with some basic IT queries

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
  - Minimum A level education required

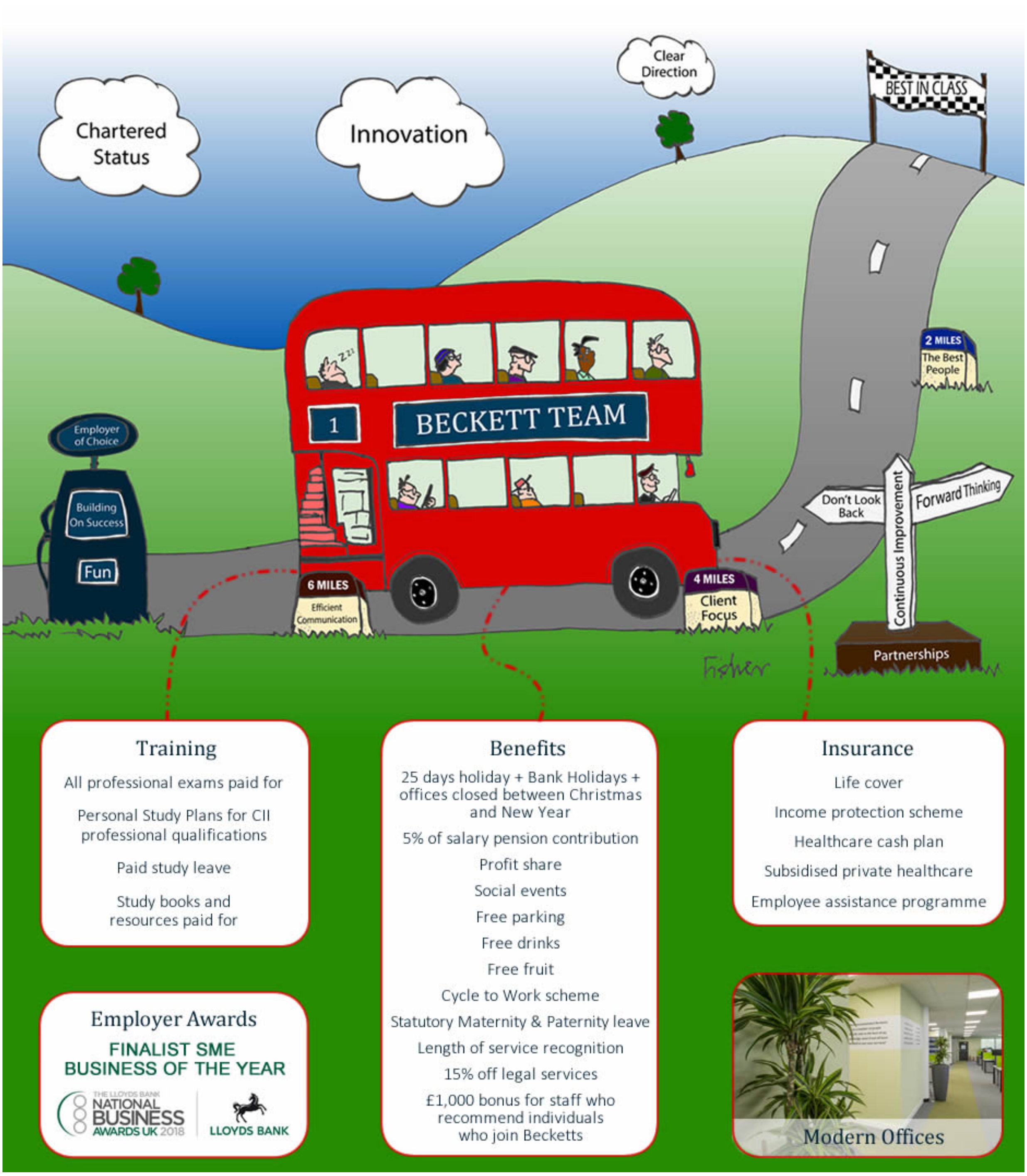
OPPORTUNITIES

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

WORKING WEEK

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

WHY BECKETT'S IS AN EMPLOYER OF CHOICE



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