

# BECKETT FINANCIAL SERVICES

EXPERIENCE TRUSTED RESPONSIBLE

Dettingen House  
Dettingen Way  
Bury St Edmunds  
Suffolk  
IP33 3TU  
01284 754500  
info@beckettinvest.com  
www.beckettinvest.com

## Business Support Role in Financial Services

### OPPORTUNITY

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This is an opportunity to join a prestigious financial services company at our head office in Bury St Edmunds.

### OVERVIEW OF ROLE

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- To work in the operations team to support maximising back office system functionality across the company.
- Gaining a detailed knowledge of a number of investment platforms to help determine best practices and implementation of process within the teams.
- Conducting a range of regular and ad hoc data analysis and reporting requirements.
- Involvement in a number of projects to enhance the services delivered to clients.

### GENERAL DUTIES

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- Data analysis and reporting from across the back office and investment platforms
- Using software to develop traditional excel reporting to more visual reporting
- Helping test and implement new functionality available on the back-office system
- Regularly reviewing existing platforms and ensuring processes and templates are correct
- Oversee key pieces of work within the teams
- Manage user log ins to platforms and provider sites
- Creating and maintaining a suite of high-level process maps
- Maintain and develop a number of calculators in excel
- Inputting data to client records on the back office

### KEY SKILLS REQUIRED

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- ✓ Willingness to work hard and have a 'can do' attitude
- ✓ Proactive and inquisitive nature with the ability to innovate
- ✓ Desire to develop excel skills, e.g. utilising 'IF' statements, pivot tables, look ups and other functionality
- ✓ Strong organisational skills, time management and ability to own and complete tasks
- ✓ Passion to support the client facing teams so they can deliver a higher standard of service than competitors to retain clients and exceed the expectations of new clients
- ✓ Relishing a challenge and learning new skills
- ✓ Interest in new technologies
- ✓ Understanding of regulatory requirements and internal policies
- ✓ Attention to detail and accuracy
- ✓ Strong verbal and written communication skills
- ✓ Minimum A level education required

### CAREER PROGRESSION

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The individual will have the opportunity to develop in the role and study professional qualifications. 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

**Chartered Status**

**Innovation**

**Clear Direction**

**BEST IN CLASS**

**2 MILES The Best People**

**6 MILES Efficient Communication**

**4 MILES Client Focus**

**Partnerships**

**Continuous Improvement**

**Forward Thinking**

**Don't Look Back**

**Employer of Choice**

**Building On Success**

**Fun**

**1**

**BECKETT TEAM**

**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

5% of salary pension contribution

Flexible working

Profit share

Social events

Free parking

Free drinks

Free fruit

Cycle to Work scheme

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**

2020

**Carbon**

**Suffolk Charter**

**BRONZE**

**Modern Offices**

## 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

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If you are interested in this role, please contact Lesley Delaney:

EMAIL: [Lesley.Delaney@beckettinvest.com](mailto:Lesley.Delaney@beckettinvest.com) or PHONE: 01284 754500