BECKETT FINANCIAL SERVICES
EXPERIENCE TRUSTED RESPONSIBLE

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Employee Benefits Support Role in Financial Services

OVERVIEW OF ROLE

To provide administrative support, primarily to the Employee Benefits team.

GENERAL DUTIES

- Preparing client meeting packs and updating records after the client meeting
- Preparing packs for employee clinic meetings
- Deal with client and provider queries as they arise
- Request policy information for client's Schemes and collate key information on a schedule
- Circulating the current client review position monthly to the team
- Reviewing the client opportunity position weekly and liaising with the team
- Assist with annual promotional/educational material for our clients and their employees
- Set up records for new client prospects and complete anti-money laundering checks
- Help with pension scheme compliance and tasks
- Draft fees, liaise with the consultant and Accounts team
- Draft new Service Agreements for issue to clients by the consultant.

KEY SKILLS REQUIRED

✓ Willingness to work hard and have a 'can do' attitude
✓ Learn about auto enrolment pensions and group risk products from day to day learning and additional reading
✓ 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

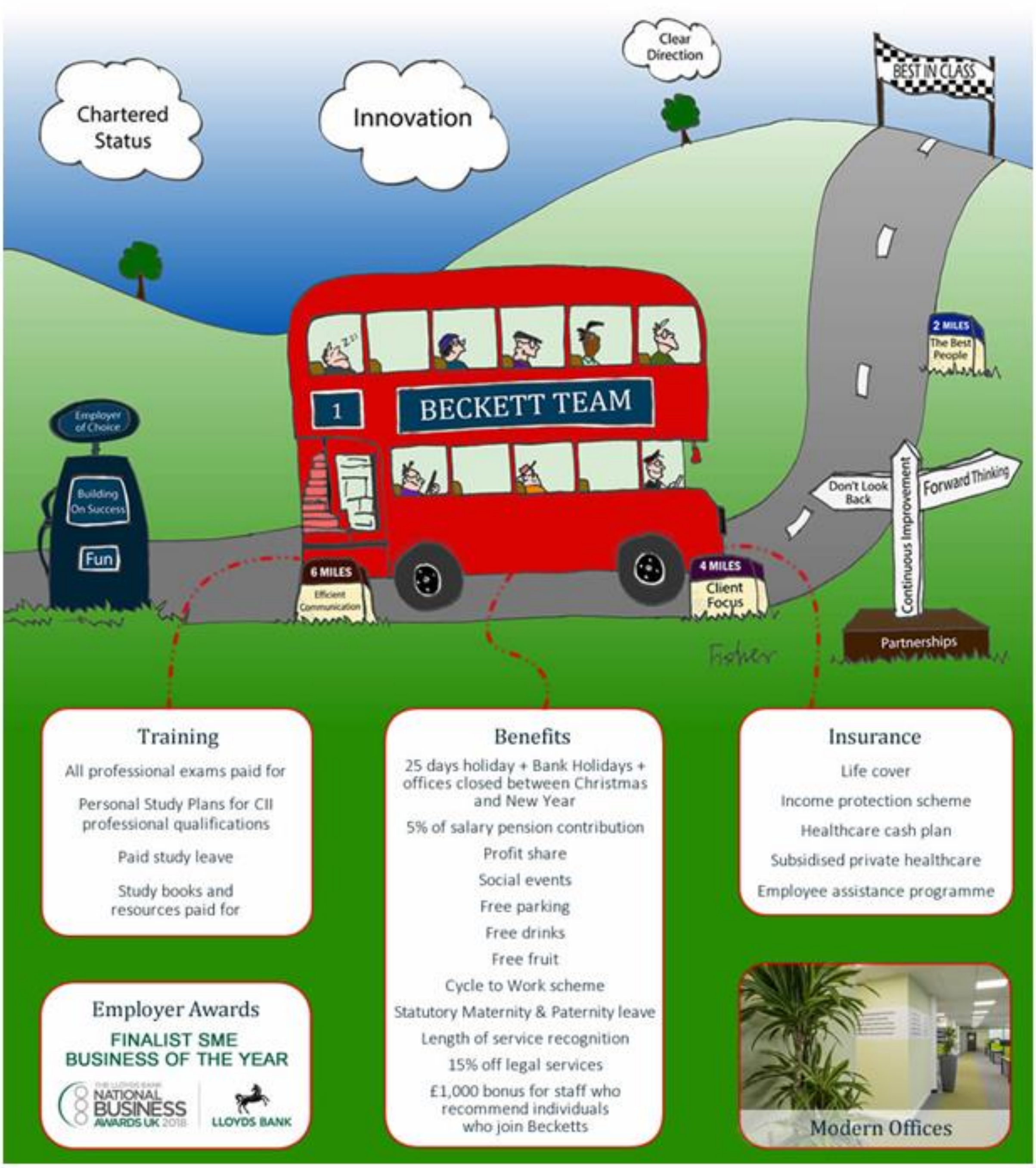
OPPORTUNITIES

The individual will have the opportunity to progress in their career. 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 Karen Hubbard:
EMAIL: karen.hubbard@beckettinvest.com or PHONE: 01284 773762