

# BECKETT FINANCIAL SERVICES

EXPERIENCE TRUSTED RESPONSIBLE

## Consultant Support Role in the Private Client Team

### OVERVIEW OF ROLE

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To provide high quality administrative support to the consultancy team enabling a high standard of service to be delivered to our clients.

### DUTIES

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#### Client Servicing

- Liaise with clients, dealing with their queries and servicing requirements. Ensure all client correspondence is clear and accurate
- Preparing packs for client review meetings including generating schedules from the back-office system (IO), cash flow, analytics graphs and other checks required
- Complete post meeting actions and conduct various housekeeping checks
- Undertake specific tasks, e.g. annual ISA utilisation project for clients

#### New Business

- Arranging completion of policy analysis, liaising with providers capturing a full audit history of information provided and transposing onto policy analysis summaries
- Collating documents, drafting suitability letters and increment letters
- Generating in house cash flow reports

#### Platforms and Providers

- Working with platforms and providers to generate wizards for new instructions and account changes to ensure clients' holdings are correctly monitored and managed
- Work with providers to make sure information and documentation is made available at the correct time

#### Product and Technical Knowledge

- CPD requirements are exceeded by undertaking regular learning and reading
- Regular training on provider systems and changes in legislation
- Annual testing to ensure core competence is maintained

### KEY SKILLS REQUIRED

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- ✓ 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 the Senior Consultant Support role and Technical Support roles and then 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

### Training

- All professional exams paid for
- Personal Study Plans for CII professional qualifications
- Paid study leave
- Study books and resources paid for

### Employer Awards



### 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



Modern Offices

## BECKETT FINANCIAL SERVICES LIMITED

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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:

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