

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 Assistant

OPPORTUNITY

This is a new opportunity to join a prestigious financial services company at our head office in Bury St Edmunds, in an administrative/business support role, within our compliance department.

KEY RESPONSIBILITIES OF THE ROLE

- Working alongside the Compliance Director, you will have a good understanding of the firm's sales process to ensure a high standard of client service is maintained.
- Be able to work as part of a team, but when required to do so, use own initiative and make confident decisions.
- To become responsible for and sign off all client communications (Corporate and Private client).
- The jobholder will be conducting client file reviews in both real time and on past client files.
- To ensure you maintain your knowledge regarding all processes and be able to discuss these changes with members of staff when required to do so
- Have a good understanding of the firm's complaints procedures and how to respond accordingly and within the timescales imposed by our regulator.
- Present yourself suitably attired both in the workplace and when visiting a client's home or business premises

JOBHOLDER REQUIREMENTS

- ✓ The applicant must be able to demonstrate they are able to pay attention to detail and challenge when the standards required are not being met.
- ✓ Be able to work independently and unsupervised at times when senior members of staff are absent due to holidays or when working away from the office.
- ✓ Willingness to work hard and have a 'can do' attitude.
- ✓ Must be flexible and friendly under pressure.
- ✓ Collaborative work style.
- ✓ Ideally the successful applicant will have a good understanding of the FCA rules and regulatory procedures expected from a Financial Services business and more specifically an Independent Financial Adviser (IFA)
- ✓ Be self-motivated and be able to see a task through to completion.
- ✓ The applicant should have achieved or be willing to work towards Level 4 of the Chartered Insurance Institute qualification (Regulated Diploma in Financial Services).
- ✓ Have a full clean driving licence and willing to travel to other offices or to client's homes/offices as and when required.

CAREER PROGRESSION

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



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 Mark Hall:

EMAIL: mark.hall@beckettinvest.com or PHONE: 01284 754500