BECKETT
FINANCIAL SERVICES

JOB TITLE: Client Servicing (Client Meeting Preparation) **DATE:** 1 October 2024

REPORTS TO: Team Leader **LINE MANAGER:** N/A

PURPOSE OF ROLE

- To provide administrative support, preparing review packs ahead of meetings in a timely manner, to the Private Client Financial Planners and Directors, to ensure that they have timely and accurate information
- To provide additional support to the whole department as and when required.
- Support and develop new team members to enable them to be as efficient and effective as possible.

KEY RESPONSIBILITIES

- Maintain client records in keeping with current processes so that they are kept up to date with all related correspondence uploaded and indexed to appropriate systems
- Ensure all documents are saved and named correctly. AF tasks are used for all client work and a concise audit trail must be maintained.
- Support, train and develop new team members to operate in an efficient manner and highlight if you find any record not adequately updated.
- Obtain information, answer questions, liaising with third parties as appropriate to ensure efficient client service.
- Keep Financial Planners and clients up to date with progress and flag any concerns or complaints to your manager
- Adopt new technology and ways of working but feeding back where a process could be developed or improved
- Processing work in a timely manner and clearly prioritising work between Tasks, Email, Post, Reviews, phone calls
- Maintain and update my talent development record, via the Beckett Academy App, ensuring my objectives are up to date and impact of any training is recorded
- Cover reception when the receptionist is on holiday, sick, at lunch or during breaks carrying out the varied reception duties required.

PRE-FINANCIAL PLANNER MEETING

- Circulate monthly update of reviews due and overdue
- Prepare FP packs once notified via FP Outlook meeting invite, allowing 1 week for the team to review the pack
- Generate and update the Advice Flow which will track the activity
- Identify any additional specific requirements from the outlook task

Packs to include:

- Intelliflo Schedule, checking for accuracy against internal records and platform
- Platform Performance Report
- FE Pack (if required)
- Cash Flow Report (if required)
- Copy of last meeting note
- Current Personal Fact Find (if required)
- Copy of current death benefit nomination form plus a blank form
- Other requirements as highlighted by team or process map

PERSON SPECIFICATION

	ESSENTIAL	*DESIRABLE*
QUALIFICATIONS	• N/A	• GCSE/A Level in Maths and English
EXPERIENCE	• Excellent administrative/secretarial experience • Good understanding of Becketts' systems and processes for PC Providing accurate and timely administrative support	• Training and development of others
KNOWLEDGE	• IO • How the PC team operates	
SKILLS & ABILITIES	• Attention to detail/accuracy • Computer literate and data management • Analytical • Good organisational and prioritisation skills • Time management • Team working • Ability to build and maintain relationships • Communication – written and verbal • Ability to follow rules and procedures	
PERSONAL ATTRIBUTES	• Behaving in a professional manner • Trust and integrity • Curiosity and willingness to learn and improve	

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues
- ✓ Adherence to procedures
- ✓ IO kept up to date

- ✓ Task management (diary)
- ✓ Competence demonstrated to prepare FP packs for client segments (Simple, Moderate, Complex) without requirement for team checking

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date: