



BECKETT

FINANCIAL SERVICES



JOB TITLE: Technical Financial Planner Support

DATE: 1 April 2023

REPORTS TO: Team Leader

LINE MANAGER: N/A

PURPOSE OF ROLE

- To provide high quality technical support across the team to enable Financial Planners and Directors to deliver a consistent, high-level service to clients. Being aligned to an individual Financial Planner or several FPs across the team
- Help maintain and develop a number of client services
- Support and develop junior team members to enable them to be as efficient and effective as possible, sharing technical resources across the team as necessary

KEY RESPONSIBILITIES

- Deliver a proactive high-quality support service to Financial Planners and Directors, assisting with technical problem solving where necessary
- Check more complex policy analysis and complete complex calculations for clients
- Liaise with clients, dealing with their queries and ensuring all client correspondence is clear and accurate
- Prepare for, and attend, client meetings to support Financial Planner by presenting part of the meeting as appropriate e.g. cashflow/CGT calculations, as and when required, in conjunction with line manager approval
- Hold regular meetings with your peers to discuss cases and to highlight changes in legislation that we need to consider and ideas for enhancing the services we deliver. Involvement with developing procedures for the team
- Ensure internal systems and processes are followed consistently amongst team members
- Support and develop junior team members to enable them to undertake tasks that will benefit the team and ultimately the client
- Highlight serious issues or system errors (provider systems or internal systems) to your line manager, dealing with day-to-day issues autonomously
- Provide technical training as required and support individual learning and development
- 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
- Undertake project activity to feedback recommended changes to promote best practise of key processes and procedures, including client facing documents

PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
QUALIFICATIONS	<ul style="list-style-type: none"> • Diploma level 4 • Active CPD 	<ul style="list-style-type: none"> • Chartered
EXPERIENCE	<ul style="list-style-type: none"> • Thorough knowledge and experience of Becketts' systems and processes • Experience of dealing with a number of high level technical queries <p>Providing accurate and timely information and administrative support</p>	<ul style="list-style-type: none"> • Development of others • Managing complex technical issues
KNOWLEDGE	<ul style="list-style-type: none"> • Maintaining a working knowledge of product key features, policy benefits and competitive strengths of providers' products that are Becketts panel approved • Maintain market knowledge by attending provider seminars and technical updates as well as financial and industry media updates • Platform functionality • Mandatory compliance training • Pass 'lead support' knowledge test 	<ul style="list-style-type: none"> • IO • Provider systems <p>Sharing knowledge and best practise with others</p>
SKILLS & ABILITIES	<ul style="list-style-type: none"> • Attention to detail/accuracy • Computer literate and data management, including company specific software • Analytical • Decision making & problem solving • Ability to train others • Planning, time management and organisation skills • Report writing & presentation skills • Time management • Ability to build and maintain relationships • Ability to work pro-actively, on own initiative and as part of a team • Communication – written and verbal 	<ul style="list-style-type: none"> • Mentoring • Leadership skills – motivating and inspiring others • Coaching • Team building • Creativity and innovation
PERSONAL ATTRIBUTES		<ul style="list-style-type: none"> • Adaptable – ability to flex your style and approach in response to different clients and difference circumstances
PERSONAL ATTRIBUTES	<ul style="list-style-type: none"> • Behaving in a professional manner at all times • Trust and integrity <p>Curiosity and willingness to challenge, learn and improve</p>	<ul style="list-style-type: none"> • Commercial awareness • Genuine interest in people

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Accurate and timely information provided
- ✓ Systems, tools and team spreadsheets accurate and up to date
- ✓ Building team and client relationships
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues
- ✓ Adherence to procedures

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work to meet deadlines
- Maintaining sufficient CPD to retain sufficient technical and industry knowledge
- Delivering a higher standard of service than competitors to retain clients and exceed the expectations of new clients

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date:
