

## Admin/Junior Paraplanner

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Company: Nelson Scott

Location: London

Category: other-general

### Job Description

#### Admin/Junior Paraplanner

Salary: to £ 30000 p.a.

Location: ,

Type: PERM

Ref: VR/04842

Job Specification

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#### JOB DESCRIPTION AND PROFILE

Job title: Client Services Assistant

Prime function: To provide an efficient and high-quality service to clients of Clear Financial Advice.

Key Contributions and Outputs:

- Ø Maintaining good relationships with all clients of the business; enhancing the profile of the Company among its clients and community
- Ø Accurate upkeep of the client details on the database to ensure up to date client details are maintained
- Ø Provide support to deal with new enquiries and prospects
- Ø Dealing with existing client enquiries
- Ø Supporting the development and maintenance of internal relationships to help maintain business flow and meet agreed targets

ØPromoting the profile of the business within the profession and wider communities

ØContinuous professional development to meet personal development needs.

Key Tasks & Responsibilities:

ØEnsuring that all processes, procedures and client communications are conducive to a high standard of customer care

ØSupporting the on-boarding of new clients into the business

ØMaintaining existing client review communications

ØHelping to deliver client referral strategy

ØWorking alongside the Client Services Team to deal with all client queries to a high standard, ensuring client satisfaction is maintained

ØEnsuring all client information and communication is kept up to date on our back-office system, Intelligent Office.

ØUsing O & M Pension Profiler (when relevant).

ØInput client ATRs into Financial Express - FE, to analysis and report outcomes.

ØActing like a client concierge if and when required

ØAssisting the investment department with the quarterly switching

ØDealing with mortgage enquiries and administration

ØSupporting the delivery of and achievement of the client service standards

ØClient continual improvement feedback communications and maintenance

ØIndividual workflow and task delivery.

ØGeneral office duties which would include, answer incoming phone calls, stationery ordering, dealing with incoming and outgoing post.

Ideally have:

ØA minimum of one years experience working in the financial services industry.

ØKnowledge of pensions and investments

ØGeneral mortgage knowledge would be an advantage

ØStrong IT skills (preferably with experience using Intelligent Office and Excel).

ØExcellent attention to detail.

ØGood communication and people skills.

ØAbility to work under pressure when required and with minimal supervision.

ØAble to analyse data.

ØHighly organised, methodical and disciplined with a good eye for detail.

ØAble to work within defined business processes.

ØRO1 would be an advantage with a willingness to progress with exams, studies and personal development.

Additional Information and Benefits:

ØWorking hours 9am - 5pm in our office based in Banstead

Ø25 days holiday plus 2 extra days at Christmas

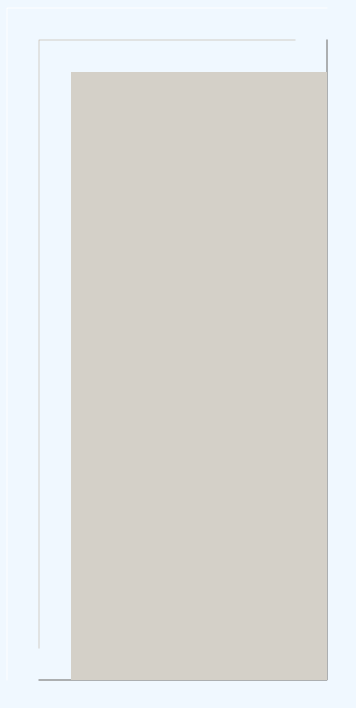
ØDeath in service

ØWorkplace pension

ØStudy support and career development

Compiled by: Joanna Lawton

Compiled on: 01/26/23



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