Job Title:	Professional Support
Reporting to:	Office Manager

Brief description of role and responsibilities:

Professional Support team members are responsible for the majority of client contact via telephone, greeting clients and visitors when they arrive at the office and written correspondence. Professional Support are required to assist the Financial Planners, Paraplanners and the business in general via the processing of administrative tasks. It is imperative that these administrative tasks are carried out in a timely manner to a high standard.

Specific Duties and Responsibilities:

- Open, scan and distribute the post each morning
- To meet and greet clients and guests as they arrive at the office in a friendly and professional manner as per the documented process. Provide tea and coffee.
- Prepare meeting rooms prior to clients or guests arriving.
- To be the first point of contact for incoming calls.
- Receive client referral sheets from Financial Planners and create new client accounts via the back-office system (Prestwood Professional).
- To contact clients to arrange and confirm Breakthrough and Annual Strategy Meetings.
- To prepare confirmation letters that are to be sent to clients with regards to Discovery and Annual Strategy Meetings.
- Complete checks for Anti Money Laundering.
- To prepare Letters of Engagements that are to be sent to clients and contact clients to ensure they are completed and returned.
- Obtain valuations and policy information from Providers for client packs, to be checked by Financial Planners prior to sending out to clients in preparation for the Annual Strategy Meetings.
- To prepare packs which include valuations and copies of net worth, income and expenditure to be updated and sent to clients with regards to their Annual Strategy Meeting 8 weeks prior to the meeting.
- Receive and act upon tasks from Financial Planners, delegated by the Office Manager.
- Send Letters of Authority and Change of Servicing Letters to Providers.
- Frank and post all outgoing correspondence each evening. Ensuring it is taken to the post box.

New Business processing:

- Checking all applications are fully completed, dated and signed.
- Adding information to database along with fees and commissions.
- Processing applications to Providers/Lenders and Solicitors.
- Acknowledging business to clients.
- Dealing with any queries from clients and /or Providers and Financial Planners.
- Follow up business to completion.

Assisting in the Security of the Office(s):

- Ensuring all windows, blinds and shutters are closed each night before the office is closed.
- Ensuring all lights are off, alarm set and front door locked (3 locks)

Miscellaneous:

- Attend Weekly Team Meetings and monthly Open Forum meetings for the Professional Support Team
- Provide minutes of the Team Meetings and post to N Drive

Qualifications:

There are no set entry requirements, however you would be expected to have GCSE Grades A-C in Mathematics and English, have excellent IT and Keyboard skills, be a good communicator and possess an excellent telephone manner.