JOB DESCRIPTION

Job Title:	Professional Support
Reporting to:	Office Manager
Salary Range	£20 -24,000

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 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 telephone calls.
- Receive client referral sheets from Financial Planners and create new client accounts via 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 Breakthrough & Annual Strategy meetings.
- Make checks for Anti Money Laundering.
- To prepare Letters of Engagements that are to be sent to clients and contact the clients to ensure they are completed and returned.
- Obtain valuations and policy information from Providers for packs to be checked by Financial Planners prior to sending 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.
- Send Letters of Authority and Change of Service letters to Providers.
- Frank and post all outgoing correspondence each evening. Ensure put in post box.

New Business processing is appropriate to your role or providing cover as and when required

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

Mortgage related work if appropriate to your role

- Proactively assisting with the mortgage process if appropriate, including New Business and liaising with clients, Providers/Lenders and solicitors to progress the mortgage application.
- Updating the mortgage expiry schedule spreadsheet with the mortgage expiry deal dates.

Fees and commission work if part of your role

- Accurately input fees & commissions on a monthly basis.
- Reconcile fees & commissions with statements and identifying any anomalies.
- Post fees and commissions statements to N drive and pass copies to MD.

Assisting in the security of the office

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

Miscellaneous

- Attend weekly team meetings & monthly Open Forum meetings for the Professional support team.
- Provide minutes of team meetings and post to N Drive.

Qualifications

There are no set entry requirements, however you would be expected to have GCSEs/S Grades (A-C/1-3) in Mathematics and English, have excellent IT and keyboard skills, be a good communicator and possess an excellent telephone manner.

Previous work in the Financial Services industry is an advantage but not essential.