

JOB TITLE: Team Support (apprentice)
REPORTS TO: Senior FP Support/Team manager

DATE: 1 August 2024
LINE MANAGE: N/A

PURPOSE OF ROLE

- To provide administrative support, primarily to *the private client* team, to ensure that they have timely and accurate information
- To ensure that records are kept fully up to date, with all related correspondence uploaded and correct indexing to appropriate systems
- To work towards a level 3 NVQ apprenticeship in business administration and to be an advocate for Becketts

KEY RESPONSIBILITIES

- Inputting information onto Beckett systems
- Undertake scanning and ensure information is saved in the right place
- Collate information and support with meeting preparation
- Produce accurate records and documents including emails, letters and files
- Undertake post client review work in accordance with the checklist
- Liaise with the team regarding reviews that are due each month and keep opportunities up to date
- Complete anti money laundering checks via Smart Search for individuals and companies house for corporate clients
- Generate policy information request letters for letters of authority and change of agency and send to providers. Set up the event list and analysis sheet
- Undertake analysis as necessary e.g. risk questionnaire and Policy analysis
- Provide general administrative support across the business as necessary, but working to *private client* team members e.g. manage post distribution and support reception
- Take ownership for learning and self-development, seeking support and direction as necessary.
- 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
- Take part in workplace activities to promote problem solving

PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
QUALIFICATIONS	GCSE qualifications including Maths and English at grade 5 +	<ul style="list-style-type: none">• A levels• Progress towards the Diploma in Financial Planning
EXPERIENCE		<ul style="list-style-type: none">• Providing accurate and timely administrative support
KNOWLEDGE	<ul style="list-style-type: none">• Mandatory compliance training	<ul style="list-style-type: none">• Knowledge of pensions and investments

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 identify and raise any issues or errors
- Ability to follow rules and procedures
- Mentoring
- Ability to work pro-actively and on own initiative
- Creativity and innovation

**PERSONAL
ATTRIBUTES**

- Behaving in a professional manner
 - Trust and integrity
 - Curiosity and willingness to learn and improve
 - Willing to help and support the wider Becketts team
e.g. covering reception/IT queries
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KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues

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:
