



## **Client Manager Support Job Description**

**Reporting to: Chris Jewson, Head of Operations**

**Position: Permanent, Full-time**

**Location: Ewloe**

**Salary: £20,000 - £29,000, based on qualifications and experience**

### **The Role**

The role of the Client Manager Support is to support the Client Manager who acts as a Paraplanner for one or more Financial Planners. You will assist the Client Manager to allow them to prepare recommendations and suitability reports in line with company policy, including preparing and maintaining client records.

You will also assist the Client Manager with the client review process, both pre- and post-meeting.

### **Key Responsibilities and Outputs**

- Supporting the Client Manager in research and analysis to meet client needs and objectives
- Supporting the Client Manager in preparing client suitability and cash flow reports
- Help maintain business flow
- You may at times be required to assist and provide support with administrative functions, for example: new business processing, income matching, collating and providing management information and organising future planning meetings with the client on behalf of the Financial Planner / Client Manager.
- Liaise with product providers and other third parties to acquire additional information that may be required in order to assess the client's needs and to formulate recommendations.
- Assist in identifying areas for planning and sourcing solutions suitable to meet the client's needs and objectives. This will include assisting in the preparation of tax calculations where necessary.
- Obtain information, quotes, illustrations and product details, and provide comparisons for analysis.
- Assist in preparing client financial reviews
- Support the Client Manager in managing the research and analysis of financial products to meet client requirements

- You will commit to continuous personal development, keeping knowledge up to date and retaining supporting records for review.
- Ensuring that any business conducted is done in a responsible and compliant manner, meeting all legislative requirements, both internally and externally.

### **Nature and scope of responsibilities**

The role holder is responsible for:

- Preparing and compiling financial analysis data
- Analysing client data and preparing cash flow analyses
- Researching products to support recommendations
- Assist the Client Manager in compiling financial planning recommendations and suitability reports
- Ensuring that all regulatory and compliance standards are met
- Liaising with product providers and other relevant third parties
- Ensuring that all client requirements are followed through to the appropriate conclusion
- Managing, recording and monitoring client reviews on behalf of the Adviser and Client Manager
- Assist the Client Manager to deal effectively with queries from clients through effective communication, ensuring a high-quality client experience at all times
- Organise future planning meetings with client when required
- Identify improvements to systems and work processes in the business
- Providing support to the Client Manager allowing them to focus on compiling the suitability report.
- Working with both the adviser and client in implementing and maintaining the Personal Finance Portal (PFP) via Intelliflo

### **Core competencies**

- Desire to take more responsibility
- Keenness to develop and progress
- Attention to detail
- Efficient
- Client focussed
- 'Can do' attitude
- Eagerness to learn

It is important that the Client Manager and Client Manager Support work well together as a strong team, offering assistance to clients irrespective of whether or not the Financial Planner is available. You may be expected to cover for colleagues who are absent.

The role holder may, from time to time, be required to undertake reasonable additional or other duties as are necessary to meet the needs of the business such as supporting the Client Support Team (CST).