Client Management Consultant

Client Management Consultants serve as the front line of Curtis Banks. They are expected to resolve client queries on a first-time basis primarily over the telephone. Individuals will be responsible and accountable for playing a leading role in improving our services.

The role requires the individual to primarily assist clients over the phone with pension enquiries (ranging from simple valuations to more technical queries) you will also be responsible for a variety of administrative tasks which will vary from day to day.

Principal Accountabilities:

- To possess an excellent working knowledge of the Curtis Banks products, the fee structure, key features and terms and conditions.
- To provide excellent standards of customer service to our clients and advisers. Working to fully resolve telephone queries and arrange follow up work when required.
- To complete various administration work in good time, to ensure requested letters & emails are sent on a same day basis where possible.
- Proactively identify improvements to our procedures within the department, to provide feedback from clients directly to the CMT Manager.
- To be patient, reliable, trustworthy and proactive on a day to day basis.
- To be driven to contribute to the success of Curtis Banks and help drive sales through customer recommendations.
- To complete comprehensive security checks in order to ensure the safety of our client data and the reputation of our organisation.
- To provide excellent record keeping including detailed telephone notes.
- To fulfil any other reasonable requirement of the department or Curtis Banks Ltd

Knowledge, skills and experience required:

- Prior client service, pensions or investments experience highly desirable.
- Degree level 2:2 or above in any discipline highly desirable.
- Able to demonstrate a good working knowledge of self-administered pension schemes, our commercial market place and where we sit in it is highly desirable.
- Ability to work well as a team, but also demonstrate self-sufficiency.
- Ability to take responsibility for own administration, including paperwork and filing.
- Excellent telephone, verbal communication skills.
- Excellent written & numeracy skills.
- Excellent organisational skills including attention to detail.
- Hardworking and able to perform under pressure.
- Drive to deliver exceptional client service, always keeping promises and aiming to drive business growth.
- Proficient computer user, comfortable with Microsoft office systems (experience with SIPP-Pro, Origo Options desirable)

General competencies:

- Is able to demonstrate a full working knowledge of all market active pension wrappers. Investment permissibility, fees etc.
- Can demonstrate a full understanding of the asset classes / instruments eligible for SIPP and / or SSAS investments.

- Understands the service level agreements set by the firm relative to the distribution channel, counterparty and service as relates to benefits administration. Is able to set priorities and quality standards in own work and those under supervision, to consistently achieve or exceed these standards.
- With training, is able to demonstrate a full knowledge of the pricing structure(s) operated by the firm across annual fees, activity fees, assessment and penalties, plus an appreciation of where commercial fee arrangements have been set with specific counterparts.
- Is able to take responsibility for own administration, including paperwork and filing
- Demonstrates an awareness of the HMRC Registered Pension Schemes Manual and how to search it for the required information.

A full job description is available on request.

This is a full time vacancy.

Office hours are: 9.00am - 5.30pm Monday to Thursday & 9.00am - 5.00pm Friday (37.5 hours)

Start date: Immediately
Duration: Permanent
Location: Bristol

All candidates will be asked to confirm their eligibility to work in the UK at interview stage and to provide evidence of it on appointment. Please note that successful candidates will be subject to a criminal records and personal credit check.

How to apply: Please send your CV, along with a brief covering email to – HR@curtisbanks.co.uk