

Senior Client Relations Officer

We are looking to recruit a candidate for the role of Senior Client Relations Officer. The Senior Client Relations Officer will investigate and resolve complaints relating to service given, in compliance with the Regulator's complaint handling rules, and you will make decisions and recommendations for compensation relating to those complaints. You will provide guidance and advice to staff on all aspects of complaint handling and assist, train and mentor staff with investigating and responding to complaints from or on behalf of clients.

Principal Accountabilities:

- Conduct investigation into complaints received paying attention to the evidence held.
- Liaise with the client, Financial Advisor and third parties on the telephone and in writing to ensure all facts are established.
- Produce a detailed report to include reasons for the decision and recommendations for redress and/or further action where applicable.
- Calculate the redress due where applicable.
- Communicate the complaint decision to the client and Financial Advisor, providing a clear explanation of all conclusions.
- Identify and report any trends or issues relating to individuals or processes.
- Where necessary, negotiate a resolution with the client.
- Manage workload and ensure complaints are finalised within the timescales set by the Regulators.
- Liaise with the Financial Ombudsman Service where applicable.
- Maintain detailed records of the investigation of each complaint.
- Providing input on technical issues, attending clients meetings where required.
- Where relevant and appropriate, informing Account Managers, clients and financial intermediaries of specific matters or issues affecting their schemes, especially actual or potential problems.
- Proactively identifies risk within the department and escalates concerns to Team Leader.
- The checking and sign off of completed work. Providing input where errors are identified and remedial training if required.
- Collating MI for management meetings and raise trends or issues through Root Cause Analysis monitoring.
- Providing guidance for other employees in respect of complaints queries or as directed by the Manager.
- To provide training to the team and the company as a whole on Complaints, Concerns and Errors.

Person Specification:

The applicants must have previous experience gained in a complaint handling role within financial services and good technical knowledge of Pension, SIPP and SSAS, products. Candidates must demonstrate a sound understanding of the complaint handling and TCF rules and ability to work under pressure. The candidate must also be able to support team members and other colleagues and maintain effective communication flow within the team.

This is a full time permanent vacancy, located in the Bristol Office.

The hours are 9.00am - 5.30m Monday to Thursday, 9.00am - 5.00pm Friday.

Start date: Immediately

Duration: Permanent

Location: Temple Quay, Bristol, BS1 6DZ



A full job description is available upon request.

All candidate will be asked to confirm their eligibility to work in the 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.

We'd love to hear from you so here's how to apply: Please send your CV, along with a brief covering email to recruit@curtisbanks.co.uk