

## HR FORMS

# JOB DESCRIPTION

2019



Job title:	Client Management Consultant	Version date:	1.0
Business area:	Key Accounts	Job family:	Customer Services
Reporting to:	Client Management Team Leader	Approved role?	Y
Job holder:	N/A	Code staff?	N/A

### Purpose

- Serve as the front line of Curtis Banks, resolving client queries on a first-time basis primarily over the telephone.
- Be responsible and accountable for playing a leading role in improving our services.
- Assist clients over the phone with pension enquiries (ranging from simple valuations to more technical queries).
- Carry out 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.

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- To fulfil any other reasonable requirement of the department or Curtis Banks Ltd.

## Qualifications

- Degree level 2:2 or above in any discipline highly desirable.

## Knowledge

- Ability to demonstrate a good working knowledge of self-administered pension schemes, our commercial market place and where we sit in it is highly desirable.

## Skills and Experience

- Prior client service, pensions or investments experience 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.
- Proficient computer user, comfortable with Microsoft office systems (experience with SIPP-Pro, Origo Options desirable)
- Fully understands the data conformance needs of each system and where key data is mastered. Able to demonstrate exceptional information security control.
- Able to demonstrate the ability to identify data anomalies and issues and correct them at source or seek guidance as appropriate.

## Declaration

It is a requirement of Curtis Banks that its employees are aware of and conform to legal requirements in all activities, both internal and external. Implicit in this is that all managers and staff not only conform to the appropriate standards in terms of Health and Safety, but also work to the highest standards of business ethics.

- I acknowledge that I have read and understood the above Job Description.

Signature & Agreement:			
Employee signature:		Date:	
Manager signature:		Date:	