

Financial Services Business Support Role Profile

Developing Talent within Shaw Gibbs

Role purpose:

The Financial Services Business Support role supports key administrative processes within the Financial Services Team.

The Financial Services Team provides a range of financial planning advice, services and access to products for companies and individuals including pensions, mortgages and life assurance.

Professional

Fair

Dynamic

Commercial

Fun

About Shaw Gibbs

Shaw Gibbs is a leading accountancy and business advisory practice based in Summertown, Oxford and London, Marylebone. Our clients range from successful individuals to owner managers or entrepreneurs of growing businesses across Oxfordshire, London and the Thames Valley region, with some of our more specialist divisions operating nationally.

Our vision

To be a clear leader in the community with an excellent reputation for client care and for employing the best people.

Our mission statement

We are a dynamic and vibrant organisation with a passion for business and finance. Our teams of highly talented individuals aim to develop tailored financial solutions that exceed our clients' expectations.

Our values

The firm is built on the values of being a **professional** and **dynamic** business providing **commercial** advice where we constantly strive to be **fair** with our staff, customers, suppliers and other key stakeholders. We also aim to ensure it is a **fun** environment where enjoyment of the role is key to delivering quality advice and getting the best engagement from our clients.

About this role

Role title	Financial Services Business Support
Reports to	FS Business Support Supervisor
Division	Financial Services
Direct reports	No direct reports
Hours	37.5 / week
Key areas of responsibility	<ol style="list-style-type: none">1. General Administration2. New Business Processing
Key performance indicators	<ul style="list-style-type: none">▶ Accurate and timely support to Advisers▶ All work is accurate, precise and completed to deadline given▶ Positive feedback from both Internal and External Customers▶ Confidentiality is upheld at all times

Key responsibilities

General Administration

- ▶ Scanning and dealing with incoming mail/faxes/telephone calls
- ▶ Printing, replenishing and ordering stationery
- ▶ Preparing, monitoring and chasing letters of authority & transfer of agency requests, ensure all information is received, query any discrepancies. Keep the client, adviser and paraplanner updated on the progress.
- ▶ Keeping the client checklist up to date and advising when all information and documents are received
- ▶ Printing and binding reports
- ▶ Meeting and greeting clients

New Business

- ▶ Submitting new business to providers
- ▶ Chasing new business pipeline
- ▶ Contacting clients re outstanding items

Other Duties

- ▶ Undertaking appropriate industry qualifications.
- ▶ Ensure good housekeeping is maintained at all times.
- ▶ Ensure all Health & Safety procedures and good practices are adhered to.
- ▶ As requested from time to time, in line with the role and responsibilities.

About you

The successful candidate will be someone with experience working within a similar role, who has demonstrable client facing relationship skills, along with excellent written and spoken English and strong attention to detail.

This role suits a methodical, conscientious and friendly individual who is comfortable with repetitive tasks, and works well in a team.

Characteristic	Essential	Desirable
Qualifications/Training		
English and Maths GCSE level or equivalent	✓	
Experience		
Minimum 2 years' experience in a similar role within an advisory firm Financial Services experience	✓	✓
Personal Attributes & Skills		
Strong numerical and analytical skills	✓	
IT Skills including:		
Intermediate Microsoft Outlook	✓	
Basic Microsoft Excel	✓	
Intermediate Microsoft Word	✓	
Attention to detail	✓	
Self-motivated demonstrating dedication, energy and commitment	✓	
Demonstrates flexibility	✓	
Ability to work with procedures	✓	
Methodical	✓	
Able and willing to undertake and succeed in a range of professional studies	✓	
Excellent planning and organising and interpersonal skills	✓	
Good communication and interpersonal skills	✓	
Self-confident	✓	
Ability to take initiative	✓	
Excellent team working skills	✓	
Ability to work under pressure	✓	
Shaw Gibbs standards		
<ul style="list-style-type: none"> ▶ It is your personal responsibility to work within Shaw Gibbs policies, procedures and processes at all times. For the purposes of clarity, this includes but is not limited to, items such as our employment policies, health and safety policies, equal opportunities, data protection, compliance and money laundering responsibilities. ▶ All employees will act in accordance with appropriate professional and legislative regulations and codes of conduct ▶ The firm expects all employees to maintain good standards of electronic and/or paper filing as required in their role ▶ You will be expected to carry out all aspects of your role profile and any additional responsibilities as requested from time to time 		