

Job Description – Client Services Support

We are Forbes Lawson. We are a boutique financial adviser based in Westhill, Aberdeenshire. We don't have hundreds of clients and we choose not to be a business that ever will.

We made a deliberate decision in designing our business to provide the type of service that can only be delivered by a select group of highly skilled and qualified advisers. It has worked well for our clients. And for us.

Ours is a service that places integrity and focus on our clients' needs above all else. Having very recently moved office, we are currently expanding our team and if you would like to join our award winning firm, we would love to hear from you.

The Role

The role of the Client Services support is to provide first class client care for clients of the business.

Key Responsibilities and Outputs

- Maintaining good relationships with all clients and associates of the business; enhancing the profile of the Company among its clients and community.
- New and existing client communications and queries.
- Supporting and dealing with new enquiries and prospects.
- Supporting and dealing with existing client enquiries.
- Supporting the development and maintenance of internal relationships to help maintain business flow.
- Promoting the profile of the business within the profession and wider communities.
- Continuous professional development to meet personal development needs.

Nature and scope of responsibilities

The role holder will have primary responsibility for:

- Ensuring that all processes, procedures and client communications are conducive to a high standard of customer care.
- Supporting the on-boarding of new clients into the business.

Nature and scope of responsibilities (continued)

- Maintaining existing client planning communications.
- Helping to deliver client referral strategy.
- Working alongside the team to support and deal with queries from all clients and from within the Company to a high standard, ensuring client satisfaction is maintained at all times.
- Acting like a client concierge if and when required.
- Client continual improvement feedback communications and maintenance.
- Individual workflow and task delivery

Must Have Skills

- Communication skills that allow you to inform, help and advise clients clearly and to liaise effectively with other professionals;
- Listening skills, to understand exactly what clients require;
- Problem-solving skills;
- Confidence, patience, politeness, tact and diplomacy, when dealing with difficult situations;
- Creative thinking, to be able to come up with new ideas to improve client service standards;
- An ability to work well and accurately under pressure;
- Organisational and planning skills to develop client services policies;
- Good personal presentation, especially when working with clients face to face;
- A commitment to improve your own client service skills on an ongoing basis;
- Share ideas and regularly engage with your colleagues;
- To be able to go the extra mile.

The role holder will keep up to date with legislative and industry changes which affect the business and its clients and ideally have experience of financial planning software and associated back office systems.

The role holder would ideally also have experience of defined benefit pension transfers whilst working in a financial planning environment although this is not a prerequisite for the job.

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.

The role holder will be required to work on a flexible basis with times & days to be agreed and be based in our office in Westhill.

To apply, please email a current CV to **enquiries@forbeslawson.co.uk**

Date of Advert: 12th February 2018