JOB DESCRIPTION

As a Client Services Team Manager within our Financial Planning team, you will be responsible for managing a team of administrators to provide ongoing support to both Advisers and Clients.

Job Title:	**Client Services Manager**
Reports to:	**Head of Operations**
Objective:	**To work as part of a well-established, growing, multi-location Financial Planning team to deliver a consistently high level of service to both Clients and Advisers**.
Location:	**Sheffield or Leeds**
Working hours:	**37.5 per week, worked between Monday to Friday**

Key Duties and Responsibilities:

- Supervising staff at varying levels of experience
- Conducting quarterly 1:1s
- Monitoring workloads and allocating an even distribution of work to ensure the efficient and smooth running of the team
- To liaise with product providers, collate policy information and obtain client specific illustrations to support the analysis of data for client asset reviews.
- Process new and top up applications for life, pension and investment business.
- Obtain valuations of existing holdings and the preparation of client review packs.
- Complete any review meeting actions.
- Process platform withdrawals, fund switches, benefit crystallisations and other online transactions as necessary.
- Work closely with the Technical Analysis team to deliver a seamless, end to end service for Advisers.
- Take ownership of ad-hoc projects as directed by the Head of Operations.
- Develop good working relationships with product providers, technology suppliers, team members, clients and Advisers.
- Group scheme renewals and the preparation of annual governance reports for existing Workplace Pension Schemes.
- Maintaining accurate, compliant files.
- Updating back-office data and following defined business processes and workflows.
- General office duties such as scanning, post, ad-hoc queries, as required.
- This role may include occasional travel between our offices in Sheffield, Leeds and Cleckheaton.

Person Specification:

- Previous experience in a supervisory role.
- Experience in providing an efficient, friendly and professional point of contact for clients.
- Enthusiastic, proactive, self-motivated and with the ability to work well as part of a team.
- Confident and articulate with a strong attention to detail.
- Ability to build good relationships and engage with colleagues at all levels.
- Excellent time management skills and an ability to prioritise workloads to meet strict deadlines.
- A good understanding of life, pensions and investment products.
- Confident in the use of Microsoft Word, Excel and Outlook, along with a good working knowledge of industry software such as back-office systems, platforms and illustration tools.

Information about the Financial Planning Team:

The Financial Planning Team is based across our Sheffield, Cleckheaton, Leeds and York offices.

At its heart, our financial planning service is not about money. It's about helping our clients find the way to the best life they can possibly lead, now and in the future.