



JOB DESCRIPTION

CUSTOMER SERVICES ASSISTANT

Reporting to:	Sarah Gardner
Job Summary:	To provide additional support to the mortgage and protection advisors within the company and ensuring the client journey is met.
Salary:	Dependant on experience
Key Duties:	<ul style="list-style-type: none">Progression of mortgage and insurance applicationsCompliance checksUtilising the 360 database and the client portal to ensure data is recorded consistently and in a timely manner.General correspondence with clients including email, telephone and face to face.Managing the advisors and own diaryAdherence to compliance requirementsAdherence to GDPRProcessing trust documents for Insurance policiesIdentifying further possible sales opportunitiesGeneral office duties as and when necessary
Additional Requirements:	<ul style="list-style-type: none">Liaising with clients (both internal and external) to obtain the information and documents required for the advisor to research and present a solution to the client.Carrying out fact finding conversations with clientsCreating suitability reports.
Measures of Performance:	Quarterly 1-1

Person Specification

Attributes	Essential	Desirable
Knowledge/Qualifications	GCSE, grade C or above, English and Maths Computer literate Advanced/Intermediate Excel skills Sound knowledge of Microsoft Outlook and Word.	Knowledge of the mortgage broker industry Knowledge of the data protection act.
Experience	Ability to self-manage A proven record of account management	Time spent in a similar role
Skills and Abilities	A strong telephone manner Work well within in a team	Time Management skills An ability to swiftly gain a thorough understanding of new and complex issues
Personal Attributes/Qualities	Ability to multi task and prioritise effectively to agreed deadlines Determination; enthusiasm and commitment Attention to detail	Work well under pressure and use own initiative