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| **Employer:** | Narwal Wealth Management Ltd |
| **Job title:** | Practice Support Team Member |
| **Level/grade:** | n/a |
| **Reports to:** | Operations Director – Gurpal Narwal |
| **Main location:** | Suite 3, Elizabeth House, 73 High Street, Syston, Leicester. LE7 1GQ |
| **Contract tenure:** | Permanent |
| **Role purpose:** | To provide dedicated support to the financial advisors for the day-to-day running of the Practice to include regulatory requirements, client servicing and IT whilst supporting the Directors in the development of the practice. |
| **Key duties and responsibilities:** | **Support to Practice Management Team\***   * Support the day-to-day business operations within the Practice; * Operate and maintain effective systems, processes and procedures which enable the financial advisor to improve client meetings; * Manage the financial advisor’s diary and client appointments; * Support the financial advisor’s in tracking client compliance requirements; * Ensure office stationery/equipment is of sufficient quality, quantity and up to date;   **Business Processing\***   * Support the financial advisor to ensure the end-to-end business process is adhered to and tracked efficiently in line with financial advisor and regulatory standards; * Oversee and manage the submission of all client applications/advice sets in support of the financial advisor; * Support the financial advisor to ensure all relevant information required for writing the client report is available; * Maintain accurate and up-to-date client information, liaise with the financial advisor and /or client for up to date information;   **Practice Development\***   * Support the financial advisor with and contribute to all relevant projects; * Support the Directors to achieve Practice goals and objectives;   **Team responsibilities\***   * Project a professional image in both appearance and attitude and provide quality support on time to agreed standards; * Attend and contribute to regular update meetings with the Managing Director; * Maintain a good working relationship with colleagues, clients and third parties. |
| **Specific authorities:** | N/A |
| **Person specification:** | **Skills and behaviours:**   * face-to-face and telephone client interaction skills * Broad experience of Microsoft Office (Outlook, Word, PowerPoint, Excel); * Good organisation skills; * Attention to detail; * Manages time effectively with the ability to multi-task; * Keeps calm when faced with conflicting demands and handles these effectively; * Demonstrates a positive attitude at all times; * Works well on own tasks as well as on shared goals as part of a team; * Open to change with a creative approach to problem solving. |
| **Required Competencies:** | * Quality Focus: Takes personal responsibility for the quality and timeliness of work and achieves results with minimal supervision.  Stays focused on tasks in spite of distractions and interruptions. * Team Work: Promotes cooperation and commitment within a team to achieve goals and deliverables. * Embracing Change: Responds positively to change, embracing and using new practices or values to accomplish goals and solve problems. * Developing Self and Others: Demonstrates an ongoing commitment to learning and self-improvement. * Communicating Effectively: Understands and learns from what others say and conveys ideas and facts using language the audience will best understand. * Planning and Organising: Manages own time, priorities, and resources to achieve goals. * Client Care: Builds and maintains a first-class experience for the client through the products and services offered by the business]. |