

# Job Description

**Role Title:** Client Services Liaison

**Reports To:** Director

**Role Purpose:** To ensure the smooth running of the front of office function, to provide a professional first point of contact to clients, callers and visitors. To provide other support in the office as required.

## **Role Requirements**

*This involves identifying the most significant responsibilities of the role. Accountability statements are key functions of the role which in combination make up the main purpose.*

### **Key accountabilities:**

- Responsible at all times for maintaining a neat and professional standard of presentation of the reception and public areas of the office (i.e. board room, meeting rooms, hallway and amenities)
- Also responsible for items which are stored in this area, such as photocopier and franking machine, and ensuring that they are in good working order and have stores of credit/ink/paper, etc.
- Manage the stocks of stationery and other office supplies, to ensure that items are held in a good and working order and in plenty of supply. Arrange orders for new supplies as required and within budget.
- Act as an initial point of contact to all clients and visitors to the office, providing them with a welcoming and professional first impression.
- Act as an initial point of contact to all telephone enquirers on the general business telephone numbers, in a prompt and professional manner. Assist with general enquiries, forward phone calls and accurate messages to relevant members of staff, and arrange some appointments when necessary (excepting clients of the Chief Executive clients, all of which can be forwarded to the Executive Assistant), however in the absence of the EA, this role should be performed.
- Follow the new clients process as set out in the office procedures manual, including issuance of documentation, keeping database up to date.
- Proactively maintain the Adviser Office database with any new client information obtained, saving documentation (both emails received and correspondence generated), and logging details of phone calls, all as set out in the office procedures manual.
- Opening and distributing incoming post daily
- Franking and collating outgoing post daily
- All audio typing for the office (digital dictation); occasional copy typing.  
Ensure that all Financial Planning Reports/client correspondence is printed off to comply with company standards as and when requested
- Ensure that all client/company filing is maintained and kept up to date
- Maintain copies of office library re EIC and IW fact-finds, terms of business etc
- Provide other assistance and support throughout the office on an ad hoc basis when needed.

### **Team**

- Direct reporting to the Director
- Liaise with the Chief Executive's PA/EA to disseminate information to the Chief Exec
- Liaise with all staff for client and provider enquiries and any ad hoc matters which may require support or sharing of knowledge/systems training

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- Liaising with all staff for any ad hoc matters which may require support or sharing of knowledge/systems training.

### ***Company and Statutory Initiatives:***

- Maintain an awareness of all company policies and procedures and apply them in the day-to-day job requirements

### ***Key Competencies/Personal Attributes:***

- Due to the highly confidential nature of this role, act with honesty and integrity at all times
- As this role is a direct representation of the company to clients, external suppliers and companies, exhibit a high level of professionalism
- Possess excellent organisational skills and the ability to meet deadlines
- Possess strong interpersonal and communication skills, both written and oral
- Be able to work independently without supervision, as well as within a team
- As this role involves handling confidential financial documents, possess a strong attention to detail and levels of accuracy
- Possess a sound knowledge of IT skills, particularly in the use of the Microsoft Office suite, particularly Word and Excel.
- Have a minimum typing speed of 60 words per minute, and be a confident audio typist
- Consider sitting the Certificate in Financial Administration through the CII and develop own continuing professional development plan in line with best practice guidelines