Assistant, Client Portfolio

Job Description

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Role Profile

JOB TITLE	Assistant, Client Portfolio
LOCATION	Bolton
REPORTS TO	Manager, Client Portfolio

1. ROLE SUMMARY

Working within a team in accordance with standards and controls for the specific member-directed pension scheme, ensuring clients are provided with a personal, portfolio based service and a high level of customer care.

Assistants are responsible for managing the client relationship for a portfolio of schemes and all aspects of pensions administration from processing new applications through to drawdown/payment of death benefits.

2. KEY ACCOUNTABILITIES

- Manage a portfolio of member directed Pension Schemes/Plans
- Respond to a range of queries and correspondence, ensuring all work is processed in accordance with SLAs and internal deadlines
- Work checklists, flowcharts, procedure notes are followed and completed at all times to reduce financial and reputational risk
- Promote the culture, conduct & behaviours required to support good customer outcomes
- Ensure that all records and internal databases are fully updated for all transactions where required to meet Company requirements.
- Ensure work is managed effectively and any regulatory deadlines are met, highlighting any exceptions and when work levels are particularly high or low to the Client Portfolio Team Manager immediately
- Resolve queries and issues by the most effective method of communication in a professional and timely manner, with reference to established frameworks and procedures.
- Liaise with other departments within the Company as required, requesting information and chasing progress.
- Take personal responsibility for own development, highlighting training needs to the Client Portfolio Team Manager
- Contribute to projects when requested and deliver within set timescales

3. EXPERIENCE REQUIRED

Delivering excellence is no easy task, particularly when you are transforming a business. So we’re looking for someone with the right experience and behaviours to join our team. The ‘DNA’ we look for starts with high proactivity and tenacity, the desire to deliver service excellence, attention to detail and a passion for both innovation and continuous improvement. As well as this, you will need to have:

- Minimum GCSE Maths & English grade C or equivalent
- Educated to A level standard or equivalent
- Proven administration skills - able to work in a systematic, organised way
- Sound knowledge of all Microsoft Applications
- Strong organisational skills
- Excellent written and oral skills
- Good communication skills, with the ability to structure communication to meet the needs of the client

About Embark Group

Embark Group is a full-scale retirement solutions provider. We are committed to acquiring, developing and holding – for the long-term – a range of financial services businesses in the UK and internationally. As an investor we look for wholly-owned, minority interest and joint venture investments that can generate value independently or in concert with other assets in our portfolio.

We look for businesses that possess the capacity for scaled growth, a proven presence in their chosen market segments, strong people with the right values, and most importantly that offer an opportunity for us to add value through digital delivery.

Our approach centres on four primary enablers: our expertise, access to leading technology, focus on consumers, and capital. More than anything, we build safe and recurring value for all of our stakeholders, customers, partners, employees and shareholders.

Our Approach

Our Expertise - We bring extensive international experience across the banking, investment, pensions and insurance sectors. Each of our key directors has a solid record of building high-quality, fast-growth businesses and we adopt a hands-on approach to our portfolio.

Access to Leading Technology - Our strategic partnership with global technology provider FNZ provides us with a market-leading digital platform to access emerging pension market segments, including international clients and products. We supplement this with our own in-house specialist digital resources.

Focus on Consumers - The delivery of appropriate consumer outcomes and the mechanics which are designed to safely achieve this are central to our approach to business and any investment we make.

Capital We are able to ensure our businesses are always adequately capitalised to allow controlled growth.

Who we are looking for?

If you have the drive and passion to be part of a growing group of businesses, we want to hear from you. Our success as the Embark Group is driven through our people engaging in our values of being:

- Easy to work with
- Consistently delivering quality
- Innovative and technically excellent
- Great value for money

Why work for Embark Group?

Highly competitive benefits package

Career progression

Meritocracy

Open and communicative culture

Excellent cash compensation

Material investment in training and development

Role challenge

No politics or bureaucracy

Opportunity to make a difference