

Customer Service Assistant

Overview

We are looking for an enthusiastic and committed individual to join our busy high profile, market leading financial services company based in Bath, who will assist with the business development programme and provide the first line of client service for the group. The ideal candidate will have competent IT and data entry skills, as well as a high level of attention to detail, effective organisational and excellent communication skills (both written and interpersonal) and the ability to talk competently with a diverse range of clients. Your personality will be the key to success in this role. Full training is provided.

The Company

We are an award-winning team of Independent Financial Advisers who provide a personal, independent and bespoke wealth management service to high net worth clients. We are an expanding business with offices in Leeds City Centre, London and Bath. Please visit our website for more information <https://www.theprivateoffice.com/>

Duties

- Customer service and support functions; in-bound/out-bound telephone calls, answering questions regarding savings products and services
- Introduce potential customers to our Financial Advisers at The Private Office
- Scheduling and confirming appointments
- Placing outbound calls for follow-ups and reaching out to prospective clients
- Presenting and explaining fees
- Recommending, selecting products and services
- General administration
- To implement and comply fully with the Company's Information Security Policy
- Any other relevant duties as directed and in line with the grade of the post

Person Specification

- Ability to record data accurately
- Good IT skills with experience of using MS Outlook, Word and Excel
- Experience of providing excellent customer service
- Marketing and product sales abilities
- High level of accuracy and attention to detail
- Effective organisational skills

- Effective verbal and written communication skills including an ability to effectively deal with telephone and email enquiries
- Ability to work co-operatively with others to meet tight deadlines

Benefits

- Full time hours (37.5 per week);
- 24 holidays (increasing to 26);
- Company Pension scheme;
- Group Income Protection;
- Life Assurance;
- Bike to work scheme;
- Eye Care Scheme;
- Full support with professional qualifications and membership;
- Wellbeing Programme;
- Career progression available.