

Assistant Relationship Manager - Jersey

PURPOSE:

To provide office based administration support to 7IM Relationship Manager/s (RM/s) and clients. The role involves extensive direct telephone contact with clients, trustees and wider professional partners, developing business support relationships with them, and taking primary responsibility for the accurate administration of their business with 7IM.

RESPONSIBILITIES:

- Help inputting, manipulating and maintaining data on the 7IM client relationship management systems to monitor prospects, generate proposals and open accounts
- Taking responsibility to ensure all client communication is accurate, appropriate and delivered at the right time, including emails, letters and proposals
- Receiving telephone queries from clients, escalating as and when necessary. After appropriate training, the Assistant Relationship Manager (ARM) will be required to take dealing instructions directly from clients and their Relationship Manager (RM) for ongoing placement
- Acting as the RM's representative in the office, enabling the information flow between the RM and clients. Where appropriate and relevant examinations passed, and sufficient market knowledge has been gained, the ARM may be required to explain 7IM products, portfolios and services, and relate them to clients' needs in terms of clients' risk tolerance and tax wrapper implications
- Help prepare client review documents and proposal documents
- Assist in the organisation of local 7IM client events including invitations to guests and monitoring acceptances, updating client details and follow ups.
- Filing, in accordance with 7IM and FCA & JFSC procedures
- Suggesting realistic and appropriate improvements to 7IM systems and procedures continually to improve service to clients and wealth managers
- Answer incoming phone calls to the required standard, giving callers an excellent first impression of 7IM
- Assist with internal meetings on a daily basis including catering
- Subscribing to 7IM's declared Mission and Tenets, and to Treating Customers Fairly (TCF) initiatives
- Other, as reasonably required by your line manager and 7IM

SKILLS:

- Accuracy, thoroughness and attention to detail in order to maintain the highest levels of service
- Systems learning skills to understand and use appropriate systems, including accurate inputting of detailed data across a number of different screens and software packages
- Strong written skills, in order to clearly, concisely and thoroughly present information to clients Numeracy skills in order to understand, process and check a range of data
- Telephone answering, rapport and relationship building skills in order to rapidly establish a high level of trust with the clients and wealth managers, to manage expectations, and to demonstrate a high level of ownership, competence, reliability and responsiveness
- Assertiveness and tenacity combined with diplomacy and sensitivity, to build and maintain good relationships with clients, and colleagues across the company. The ability to ensure that necessary actions are taken to service clients, whilst maintaining positive relationships externally and internally
- Planning and organising skills to maximise operational efficiency and service, including prioritising appropriately
- Resilience in order to manage conflicting priorities and demands, ambiguity and demanding work loads
- Personal development focus, taking responsibility (with 7IM) for driving forward both personal and professional development in order to maximise effectiveness in this demanding role, and to grow in the role, and beyond

KNOWLEDGE:

- Knowledge of discretionary investment management administration, would be advantageous
- Knowledge of Pershing systems and procedures would also be beneficial
- Knowledge of general office administration and Microsoft Office is preferable

For more information call 0207 760 8777 or visit www.7im.co.uk

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JOB DESCRIPTION

QUALIFICATIONS:

- Industry relevant qualification is desirable
- Training support provided to complete industry relevant qualifications (such as CISI IAD level 4) once the successful incumbent has a thorough understanding of the role

OTHER RELEVANT INFORMATION:

- Reports into the Head of Private Client Service with a local reporting line to Team Head Jersey for all local matters.
- Resident in Jersey and ability to work in Jersey
- Happy to travel to London for training, development and wider 7IM engagement

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