# Job Description

## Private Client Assistant

### Purpose
Work within a Client Relationship Team to provide office based administration support to the team and their clients. The role involves extensive direct telephone contact with clients, supporting relationships with them, and taking primary responsibility for the accurate administration of their business with 7IM.

### Responsibilities
- Helping in inputting, manipulating and maintaining data on the 7IM client relationship management systems to monitor prospects, generate proposals and open accounts
- Taking responsibility to ensure that all client communication is accurate, appropriate & delivered at the right time, to include emails, letters and proposals
- Continually updating Client Relationship Team Lead on workloads
- 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 the PCMs for ongoing placement
- Supporting the Client Relationship team with proposal writing, portfolio analysis, ongoing suitability requirements & other tasks such as ongoing client fact finding
- When required, help prepare client review documents and proposal documents
- Planning and organising work flow with the PCMs, especially during client reporting periods
- Liaising closely with relevant members of 7IM's Operations team to ensure full communication and understanding, minimising errors and maximising service levels
- Filing, in accordance with 7IM and FCA procedures
- Suggesting realistic & appropriate improvements to the PC Continuous Improvement Process and Service Delivery Manager concerning 7IM systems and procedures, in order to improve client service & internal processes
- Subscribing to 7IM's declared Mission and Tenets, & to Treating Customers Fairly (TCF) initiatives
- Other duties, as reasonably required by the line manager and 7IM

### Skills
- Accuracy, thoroughness & attention to detail in order to maintain the highest levels of service
- Systems learning skills to be able to rapidly understand & use appropriate systems, including accurate inputting of detailed data across a number of different screens and software packages
- Written skills, in order to clearly, concisely and thoroughly present information to clients and wealth managers
- Numeracy skills in order to understand, process & check a range of data
- Telephone answering, rapport and relationship building skills in order to rapidly establish a high level of trust with clients and wealth managers
- Ability to manage expectations & demonstrate a high level of ownership, competence, reliability & responsiveness
- Assertiveness & tenacity combined with diplomacy & sensitivity, in order to build & maintain good relationships with clients, wealth managers & colleagues across the company
- Ability to ensure that necessary actions are taken to service clients, whilst maintaining positive relationships externally & internally
- Planning & organisation skills to maximise operational efficiency & service, including appropriate prioritisation
- Flexibility & innovative mindset, in order to be able to handle & support changing, and sometimes conflicting, needs & demands, & to continually improve working practices
- Resilience in order to manage conflicting priorities & demands, ambiguity and demanding work loads

- Personal development focus, taking responsibility (with 7IM) for driving forward both personal & professional development, in order to maximise effectiveness in this demanding role, and to grow within the role, and beyond

## Knowledge

- Knowledge of discretionary investment management administration, including tax wrappers
- Knowledge of Pershing systems & procedures would be beneficial
- Knowledge of general office administration and Microsoft Office is preferable
- Knowledge & background from a Wealth/Financial Planning environment would be beneficial

## Qualifications

- An industry relevant examination (such as to CISI IAD level) is highly desirable. Support is provided by 7IM for those who are already part-qualified to complete the qualification

## Other relevant information

- Reports into the Private Client Team leader on the Private Client team