Job Title: Client PA	**Reports to:** Regional Practice Manager
Salary Band: Competitive	**Location:** Leeds

Job Purpose

As a Client Service Assistant, you will work closely with the Planner to provide day to day support to ensure delivery of a high standard of client service

Responsibilities & Accountabilities

- Acting as a first point of contract for all Clients: dealing with correspondence and phone calls.
- Managing diaries and organising meetings and appointments, often controlling access to the Planner.
- Preparing for Client meetings, collating required information for reports from Paraplanning and Tech Admin.
- Maintaining the accuracy of Clients KYC record, via the firm's system and processes.
- Dealing with incoming emails and post, within the processed laid out by the firm.

Person Specification

- Exceptional written and oral communications skills.
- Excellent word processing and IT skills, including knowledge of a range of software packages.
- The ability to work under pressure and to tight deadlines.
- Knowledge and understanding of Product Provider websites and on-line systems, Old Mutual Wealth, Elevate, Transact and Standard Life.
- Knowledge of financial services products, rules and regulations.

Benefits

- Competitive salary and bonus scheme
- 25 days annual leave in addition to bank holidays.
- Group Pension Scheme and Private Health Care Scheme.
- Life Assurance Scheme.

** This job advert isn't exhaustive and a detailed role profile is available upon request.*