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# Job Description – Advice Support – New Case Team/Chasers Team/NB RI Team

**Job Title Advice Support Administration Assistant**

**Reports to Advice Support Team Leader/New Case Team Leader**

**Location Manchester**

**Purpose of the Role** Provide administration support to the Advice Team in respect of Pre-Advice and Post Advice. You will be in contact with client’s introducers and providers to ensure the smooth running of the advice process.

**Principal accountabilities** To establish and monitor the new cases being received.

Check all incoming information relating to ensure its correct and complete

Contact the client with any queries, outstanding documents, or updates

Perform smart search

Track receipt of required documentation and liaise with the Adviser and Administrator to ensure received in time.

Chase the client for responses as appropriate.

Ensure the prevailing databases and client folders are kept up to date

To make and answer telephone calls as necessary and always have a friendly and professional manner.

Assist in the archiving of client files

**General for all staff** The principle accountabilities will change from time to time and the post holder is required to undertake any additional duties as deemed appropriate.

Staff are required to have a Personal Development plan and to participate in training, meetings or conference considered relevant to their job.

Staff must carry out their duties with full regard to the rules, policies and procedures and conditions of service contained in the staff handbook.

To abide by the company’s policies and procedures.

To adhere to all health and safety legislation.

To undertake any other task deemed reasonable within your skill set.

**Qualifications & Experience:** At least 6 months office experience.

**Competencies:** Excellent organisational skills, meticulous attention to detail.

Exceptional verbal and written communication skills

Able to manage workflow and communicate effectively

Self-directed approach and strong sense of ethics

Strong Microsoft Office Skills of a standard to perform any tasks for the role (to include use of a client database, email, web, and any other systems that are required from time to time.

Knowledge and understanding of the regulatory standards

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| Values | |
| Performance | Learn from and apply feedback from Manager to improve performance  Embrace training that will benefit the customer, company, colleagues and individual  Places company goals above personal objectives. |
| Customer Service | Ensure that focus is on the needs of the customer delivering efficient and effective service delivery |
| Integrity  Honest and ethical behaviour in all activities | Uphold the highest personal  Professional standards  Committed to equality and Diversity in the workplace.  Work honestly and ethically with zero tolerance for unscrupulous behaviour  Strive to fulfil commitments  Accepts responsibility for actions and results of those actions  Makes consistent decisions regardless of situation or outside pressures |
| Transparency | Provision of clear and understandable information to customers and colleagues on all aspects of responsibilities |
| Initiative | Anticipate problems and address/escalate issues before crisis situations develop  Actively work to identify improvements areas of company processes |
| Teamwork | Encourages and supports other employees  Exhibit good listening skills  Willing to collaborate with colleagues |