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# Job Description – Case File Fact Finder

**Job Title Case File Fact Finder**

**Reports to PTS Supervisor**

**Location Manchester**

**Purpose of the Role** Provide administration support to the ‘Know Your Client’ area of the business, by confirming and recording clients personal data. Reporting to the PTS Advice Supervisor.

**Principal accountabilities**:

**Pre-Discussion Check**: Check the client has completed our Forms

**Confirmation Discussion:** Liaise with clients by phone to confirm information.

Submitted by the client

**Appropriate Queries**: Recognising errors the client may have submitted and querying them

**Pensionhelp Process:** have sufficient knowledge to outline our process to help the client to prepare to enter our advice process

Chase the client for responses as appropriate.

To update the prevailing databases

Liaise with colleagues and flag any potential issues to line manager.

To make and answer telephone calls as necessary and have a friendly and professional manner at all times.

**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. Preferably in a financial services background.

**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 |