Job Title: Associate (Wealth Advice)

1. Role Specification

Key Purpose of Role: Helpdesk Delivery

The role of the Associate is to assist the organisation in the delivery of outstanding financial services to AES international clients in line with the strategy devised by the organisation. The role will involve learning about how to identify a client's needs and how to direct them to an appropriate solution. A large amount of the time is spent either on triage or on administrative tasks with the objective of learning the companies processes and methodology.

Primary Responsibilities:

- Helping clients with self-directed solutions
- Assist with the preparation of outstanding financial advice on investments in an efficient manner
- Support the advisory teams to execute client relationship strategy
- Support the Senior Associates to maintain strong relationships with clients, driving engagement and positive client outcomes
- Ensure that the work undertaken complies with regulatory guidelines issued by the compliance department

Main Duties

Client Service Delivery
(Value – Make it Happen)

- Respond to inbound enquiries at the very earliest opportunity.
- Support the advisory teams to develop and execute a client service strategy to ensure that existing clients are managed to the highest standards
- Support the Associate Directors and Senior Associates to ensure clients receive good value from our service and assist with quality control, ensuring all client work and supporting documentation is of the highest standards
- Where appropriate, engage with clients to build relationships

Achieve Good Client Outcomes
(Value – Lead from the Front)

- Support the advisory teams to ensure consistent high quality of service to clients to drive engagement and keep attrition low
- Proactively work to ensure all clients receive a positive client experience and take appropriate action to drive positive client outcomes
- Delivering client work to advisory teams in a timely, effective and efficient way, with a high degree of accuracy
- Accurately undertake the implementation of client advice

Working as a Team
(Value – Working Together)

- Cultivate the values and behaviours of AES international within the organisation
- Work closely with colleagues to ensure that all clients receive excellent service
- To support the advisory teams to ensure work is completed within agreed SLAs
- Proactively prepare for regular 121s actively seeking to develop experience and competencies

Service Development
(Value – Thinking with Purpose)

- To participate in and/or support key projects and practice/technical initiatives across the business as required.
- Provide constructive feedback to Client Service Advisers on new and existing processes to aid in the development of these

Conduct
(Value – Be the Difference)

- Be a brand ambassador for AES international and promote all services, our values and behaviours to ensure good client outcomes and meet our conduct responsibilities
- Take responsibility for ensuring you read and understand all technical research, legislative and regulatory change updates provided by internal departments
- Ensure technical knowledge is up to date
- Ensure work produced complies with the regulatory and legal environment

2. Person Specification

Knowledge and Qualifications

- Minimum of degree or equivalent qualification.

Skills and Attributes

- Strong organisational skills
- Excellent communicative and interpersonal skills (presentational; listening; diplomacy; influencing)

- Clear commitment to an effective and efficient organisation
- Proven record of delivering all work accurately, on time and to agreed SLAs
- A positive and engaged attitude with a willingness to learn and develop skills
- Ability to:
  - Work effectively as a member of a team
  - Relate well to staff across AES international
  - Participate in projects and identify areas for continuous improvement
  - Work under pressure and to tight deadlines

Experience

- Interest in financial markets/personal financial planning
- Previous work experience or internship within the financial services sector preferred
- 0-3 years

APPLY