

<b>Position applied for</b>	<b>Client Relationship Team Member</b>
<b>Reporting to</b>	CRT Team Supervisor
<b>Employment status</b>	Permanent Full time
<b>Salary range</b>	Competitive
<b>Hours:</b>	37.5 hours per week in accordance with the Flexible Working Hours scheme
<b>Location</b>	Salford

**Purpose:**

The main purpose of this role is to ensure that clients of Frenkel Topping Limited are receiving the best possible service that makes us stand out as the premier specialist Financial Planner for clients in receipt of life changing settlements.

The Client Relationship Team will be the main point of contact for our clients and ensure that our service develops and grows to meet our client needs and does not stay stagnant

They will collate and provide monthly data to be included in the MI Dashboard each month so that the Management Team can monitor progress and success of the services provided and allow us to make decisions on changes required to continue to meet our clients needs

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**Key Responsibilities**

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- Main point of contact for clients which includes ensuring that any client queries received are actioned by the correct team, within a timely manner and updates provided to client
- Issue Welcome Packs to new clients
- Quarterly contact points by phone or email
- Booking annual reviews for Consultants
- Manage client contact and follow up if consultant leaves
- Facilitate client and introducer office visits
- Ensure iO is kept up to date
- Maintain client meeting rooms
- Monthly update for CRT Team Supervisor

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**Person Specification: Assessment Key: A=Application Form I=Interview T=Test  
E = Evidence**

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Area	Requirement (All criteria are Essential unless defined as Desirable)	Assessed by:
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Experience in using standard office software products including excel, word, outlook</li> <li>• Experience of providing administrative support in a busy office environment</li> </ul>	A/I A/I
<b>Skills &amp; abilities</b>	<ul style="list-style-type: none"> <li>• Ability to communicate effectively with a wide range of people including legal representatives</li> <li>• Ability to prioritise and manage own workload</li> <li>• Ability to communicate effectively both orally and in writing.</li> <li>• Have a keen eye for detail and an exceptional level of accuracy when producing documents and inputting data</li> </ul>	A/I A/I A/I A/I
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>• Display self-motivation, drive and enthusiasm</li> <li>• Possess a flexible approach to work</li> <li>• Excellent telephone manner</li> <li>• A desire to support vulnerable clients</li> <li>• Be hard working , enthusiastic and reliable</li> </ul>	A/I A/I A/I A/I A/I
<b>Education and Training</b>	<ul style="list-style-type: none"> <li>• Excellent written and verbal communications and numeracy skills</li> </ul>	E

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**General Responsibilities**

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- This job description is current at the date shown, but in consultation with you, it is liable to variation by management to reflect or anticipate changes in or to the job. It is expected the post holder will when required undertake other duties commensurate with the post and salary grading if required.
- Duties may involve having access to information of a confidential nature that may be covered by the Data Protection Act, be commercially sensitive or relate to client information. In such circumstances confidentiality must be maintained at all times in

accordance with the company policies. If you are unclear at any time refer to your manager.

- Undertake all reasonable personal development actively designed to support you in your role.