

## **Client Services Coordinator – Cheltenham**

Do you have customer service experience within Financial Services? Do you thrive in a busy and fast-paced environment? Are you ambitious and looking to start a career with a company offering personal development and an excellent benefits package? If so, please keep reading!

We are recruiting for a Client Services Coordinator to join our busy team in Cheltenham.

We provide our advice and service through Attivo Financial Planning, one of the very few genuinely Independent, Chartered, Pension Transfer Specialist, financial planning firms in the UK.

### **Main responsibilities**

You will be responsible for providing exceptional service to all of our existing and new clients whilst projecting a positive and professional image of Attivo Group to ensure client retention.

You will be dealing with any ad hoc client queries, ensuring they are dealt with in a timely manner, often liaising with Financial Planners, Paraplanners, our Senior Technical Support Team and external companies.

You will attend client events as and when required, maintaining a courteous and professional manner. Along with the rest of the team, you will be responsible for managing the diaries of our Financial Planners by arranging client meetings for them and annual financial planning reviews with our existing clients.

You will develop and maintain an up to date knowledge of the financial services industry and how changes affect Attivo Group's clients.

### **Qualifications, skills and experience**

- previous experience in a customer service role is essential
- 6 to 12 months experience within Financial Services would be advantageous
- excellent communications skills both written and verbal
- strong organisational skills and the ability to work with a high level of accuracy
- ability to forward plan, manage business demands and expectations
- appreciation of business processes, systems and technology
- you will be confident, personable, polite and able to work within a fast-paced environment
- a desire to progress through CII Diploma in Financial Planning – company study support available
- minimum 5 GCSEs graded A-B, including Maths and English
- educated to degree level would be an advantage.

### **Salary and benefits**

£18,000 - £22,000 depending on experience and qualifications.

Attivo Group also offers:

- excellent Company Benefits package including a non-contributory Pension Scheme, Private Medical Insurance, Income Protection, Critical Illness and Death in Service
- generous holiday allowance
- corporate gym membership
- parking allowance for employees who live over 1.5 miles away from the office (Cheltenham only)
- regular company social events
- charity days
- excellent culture, promoting employee wellbeing and engagement.

## **How to apply**

For further information, please get in touch. To apply for this role, please email your CV along with a covering email or letter to [careers@attivogroup.co.uk](mailto:careers@attivogroup.co.uk).

## **Privacy Policy**

If we have received your details in response to a recruitment initiative, we will store the personal information that either you, your recruitment agent or another third party has provided us with. We process that information because it is in our legitimate interests to do so in order for us to be able to make an informed decision about whether to interview you and, ultimately, recruit you.

We believe that you would reasonably expect us to process your personal information in this way and that such processing does not have an impact on you in a way that would make this processing unfair. Where your personal information is kept as part of a file relating to prospective employees of Attivo Group, we will retain that information and any information relating to that matter. This is so that we can review the file if any complaints or issues arise after the recruitment process. The length of time that we keep prospective employee files is usually 3 months after conclusion of the relevant recruitment process.

Unless you request us not to do so, we may also contact those individuals who are referred to in any information you provide us with, for example referees. This contact may be made by telephone, e-mail or post. We will only do this if we have your express permission to contact them in this way.

Where you have provided us with personal information about a referee or a previous employer, it is your responsibility to inform that person that you have provided us with their details and that we will be processing it in connection with your employment application. You should also give them our contact details (below) should they wish to discuss this with us. Click [here](#) to view our full privacy policy for prospective employees.

## **Agencies**

**\*\*We are unable to offer this position to recruitment agencies so we respectfully ask that agencies do not contact us in regard to posts advertised on this site\*\***

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