



EMPLOYEE BENEFITS ACCOUNT MANAGER

Provide support and co-ordinate their work between team members ensuring the provision of a first class support service for their clients. This is a non-advising role.

THE PERSON

- Communicate effectively with people at all levels.
- Lead by example
- A high level of commitment to their role and the Company
- A willingness to support team members
- Maintain high standards of work and a positive attitude at all times
- Understand Company direction and goals and a commercial awareness of targets, business focus, and sales campaigns in progress
- Retain a knowledge of products arranged by the Company
- A high level of customer service and a proactive approach to Company systems and procedures

SKILLS AND KNOWLEDGE

- High level of Customer Service
- Excellent telephone manner
- Good organisational skills
- Professional business manner
- Proactive approach

CORE TASKS

- Support for the EB Adviser
- Basic admin duties on behalf of the Adviser including; control of Adviser diary, appointment scheduling and associated preparation for new/existing/Group clients
- Liaising with Researcher and other team members when distributing work
- Researching new business opportunities
- Scanning and filing using electronic filing system
- Data Entry
- Arrange Group Risk Renewal annually
- Process New Group Member applications
- Liaise with Employer / Employee in respect of any queries or updates
- Up to date knowledge of employee benefits available, underwriting limits, and CIC benefits
- Other ad hoc duties as the role evolves

WHAT WE OFFER

- Generous Employee Benefits Plan
- Pension contributions matched up to 5%
- 35 hour week with 20 days holiday + Bank Holidays (plus annual increase up to 4 years)
- Birthday + Christmas/New Year Closure off
- 4pm finish on Fridays
- Flexible and Hybrid Working
- On-site Mental Health First-Aiders
- Regular team-building activities

Interested applicants please email a CV to Pippa Ellis pellis@beaconwealth.co.uk