GILSONGRAY

LAW • PROPERTY • FINANCE

Client Support Specialist

Department: Financial Management

Location: Edinburgh

Contract type: Full-time, Permanent

About Gilson Gray

Gilson Gray's Financial Management team is part of Gilson Gray's continuingly growing organisation. Gilson Gray is a comprehensive law firm, offering expert legal, property and financial services. We support clients throughout their entire lifetime. The Financial Management team have decades of experience in Wealth Management and can advise on a wide range of wealth management and financial planning matters.

With offices across Edinburgh, Glasgow, Aberdeen, Dundee, Perth, Forfar, North Berwick, Lincoln and London, our continued growth is driven by commitment to delivering exceptional client service and practical, client focused advice. This role would be based in our Edinburgh office. We pride ourselves in looking after our clients personally and providing the utmost standard of service. We are now seeking an experienced Client Support Specialist with experience within a financial planning, wealth management, IFA or financial services environment to join our Financial Management team in Edinburgh. Previous experience within an SJP Practice would be additionally advantageous.

Our Team

We are looking to hire a highly driven Client Support Specialist to join our successful Client Support Specialist team within Gilson Gray Financial Management. We are an enthusiastic team that support each other in order to achieve a great working environment. We value each other's expertise and opinion and pride ourselves in offering an inclusive, enjoyable and motivating place to work.

The Role

We are looking to further strengthen our current team with the appointment of an experienced candidate.

As a Client Support Specialist at Gilson Gray, you'll be responsible for:

- Providing high quality support to clients to ensure they receive an excellent client experience;
- Oversee and manage annual reviews end to end process for clients in line with Consumer Duty requirements, working closely with the adviser and clients to plan and arrange these meetings;
- Prepare client reviews, updating cash flow models, investment performance reviews and production of supporting reports and discussion documents;
- Maintaining accurate client files and ensuring FCA regulatory requirements are met;
- Prepare, complete and submit investment related documents such as withdrawal forms and trust forms;
- Respond and support client requests including processing withdrawals, fund switches, letters of authority and update on Salesforce;
- Performing day to day administrative tasks such as responding to Client emails and requests;
- Issuing Letters of Authority for the Practice and day to day management and tracking of outstanding Letters of Authority;
- Managing the Practice pipeline of new business and contributing to meeting monthly targets by diligent oversight of this;
- Being a key point of contact for the Practice for St. James's Place Administration Centre;
- Responsible for all incoming and outgoing paper Client documentation to ensure 100% accuracy and meets brand requirements including annual review paperwork and letters;
- Support the advisers to ensure the end-to-end business process is adhered to and tracked efficiently in line with regulatory standards;
- Maintain accurate and up-to-date client information and ensure that this is held on Salesforce;
- Regular 121 meetings to provide support to the Financial Advisers;
- Attend and contribute to regular update meetings and workshops as offered by St. James's Place.
- Providing assistance to advance new and existing technology to improve the role.

Required Knowledge and Experience

- Previous experience in a financial planning, wealth management, independent financial advice (IFA) or financial services support role is essential.
- Knowledge of financial service regulations and legislation
- Experience of using client management systems
- Broad experience of Microsoft Office, advanced Excel and experience of using Salesforce

Our ideal candidate would also

- Demonstrate exceptional client service skills and a genuine commitment to client care
- Have strong organisational skills with the ability to manage multiple priorities
- Be highly accurate with excellent attention to detail
- Be confident communicating to clients, colleagues and external stakeholders
- Show initiative and a proactive approach to problem solving
- Work collaboratively whilst also being comfortable managing their own workload
- Thrive in a fast-paced professional services environment

Benefits

- A competitive salary with annual review and performance-based bonus
- 32 days holiday a year (includes bank holidays)
- Birthday day off
- 3 x Death in Service benefits
- Membership of an occupational pension scheme
- Wellbeing initiatives and access online Health Provider

This is an exciting time to join us. Think this is for you?

Get in touch for a confidential chat about how you can become part of the team at recruitment@gilsongray.co.uk