



**GILSON GRAY**

LAW • PROPERTY • FINANCE

# Client Experience Specialist

Department: Financial Management

Location:

Edinburgh/Glasgow/Dundee/Aberdeen

Contract type: Full-time

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## About Gilson Gray

Gilson Gray's Financial Management team is part of Gilson Gray's continually 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 every Financial Management related case.

Based in Edinburgh, Glasgow, Aberdeen, Dundee, Forfar, North Berwick, Lincoln, and London we focus on ensuring we provide the highest level of advice and on-going service to our clients. We are ambitious and have significantly grown the team over the course of the last year. We pride ourselves in looking after our clients personally and providing the utmost standard of service.

This role would be based in any of the following offices, Edinburgh, Glasgow, Dundee, Aberdeen.

## Our Team

We are looking to hire a highly driven Client Experience Specialist to join our successful Practice 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 Experience Specialist at Gilson Gray you'll be responsible for:

- Engaging with Clients to build relationships to ensure excellent Client experience and outcomes
- Using Salesforce daily, our Client Review System to accurately record all client activity and preferences
- Liaising with Advisers regularly to ensure Clients receive their annual review on time
- Event Management – contact strategy for Clients, guests and prospects
- Using St. James's Place documentation, following procedures and processing Client instructions

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## Required Knowledge and Experience

- Previous experience in a client experience role, ideally in financial services or related sector
- 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



[www.gilsongray.co.uk](http://www.gilsongray.co.uk)

Aberdeen | Dundee | Edinburgh | East Lothian | Forfar | Glasgow | Lincoln | London

## Our ideal candidate would also

- Have excellent social and interpersonal skills dealing with clients
- Have excellent communication, organizational and attention to detail skills
- Take pride in producing high quality, accurate and timely information
- Show excellent verbal and written communication skills
- Problem solving and analytical skills
- Demonstrate excellent attention to detail
- Ability to work as part of a large team and contribute to the overall business aims

## Benefits

- A competitive salary with annual review and potential bonus award depending upon performance
- Full training and career development plans including St. James's Place Accreditation
- 32 days holiday a year (inc. Bank Holidays)
- 3 x Death in Service Benefits
- Membership of an occupational pension scheme
- Wellbeing initiatives and opportunity to access online Health Provider
- Hybrid Working

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](mailto:recruitment@gilsongray.co.uk)



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