# Bestinvest Coach

## Job Purpose

Provide professional, effective, efficient and compliant telephone /virtual based service to clients. Deliver both coaching & advice to both existing and new clients. Building and developing strong relationships with clients. Ultimately leading to strong client retention and identification of new advice opportunities i.e. assets under management and fees.

Responsible for delivering both coaching & advice to clients. All advice given to clients must be suitable and personalised to the client in line with advice and control policies, within the structured and defined scope, following policy, procedures and workflows to ensure appropriate and good client outcomes.

Where appropriate identify broader needs of our clients, and facilitate an introduction to the relevant T S & W specialist as appropriate , building relationships internally to ensure seamless delivery of client experience.

## Key Responsibilities

- Provide telephone or 'virtual' based service / support to clients & prospects
- Contact referred clients/prospects within agreed Service Levels Agreement to arrange a suitable appointment.
- To deliver suitable, personalised Coaching OR 'goal based/focused' advice to satisfy client needs
- Appropriately and compliantly identify when a client has more complex needs that requires a T S & W Specialist
- Prepare, check and issue accurate and compliant communications and suitability reports to clients in a timely manner to support advice
- Ensure that the XPLAN database and client electronic records are complete and remain up to date
- Achieve qualitative and quantative performance, productivity, activity and conversion levels necessary to deliver the target levels agreed with Manager.
- To plan, implement and execute the delivery of annual Business Plan in line with client allocation and individual targets set as agreed with the Manager.
- Take ownership where issues arise to ensure successful resolution to deliver client satisfaction, whilst following all Tilney complaint procedures and compliance policies
- Adhere to Tilney compliance procedures and apply the prescribed advice processes.
- Uphold individual responsibilities associated with Treating Client's Fairly, Data Protection and Anti Money Laundering
- Ensure completion of all relevant Continued Professional Development, including attendance of training to develop knowledge and skills in order to provide technical support to clients and colleagues
- To ensure minimal client attrition through effective ongoing service to clients
- To act in a professional capacity with external and internal clients to deliver the Company's culture and ethos to build a respected and valuable business

## Skills and Qualifications

### Minimum Qualifications:

- Diploma (Dip PFS) or equivalent.

### Technical skills and attributes:

- Proven ability to deal with new and existing clients

- Trustworthy: able to gain respect and trust of colleagues
- Articulate: able to explain complex ideas in a straight-forward way
- Technical/product knowledge and effective communication of wide ranging holistic financial planning strategies & solutions