

Job Description

Job title:	Financial Services Administration Apprentice
Department:	David Allen Financial Services
Line Manager:	Financial Services Team Leader
Line management responsibilities:	None

Aims and purpose of the job

To provide a high-quality customer and client-focused administration support service to the Financial Services Team, in full compliance with all financial services, statutory and regulatory processes, policies and procedures.

To build supportive relationships with colleagues within the wider David Allen Group as well as with clients and providers to ensure that the financial services team can work collaboratively with other functions to identify new or developing client relationships.

Generic role duties to include:

1.	To take full responsibility for all work and tasks assigned to you.
2.	To maintain adequate stocks of necessary office supplies within the department.
3.	To deal with all incoming and outgoing post; to sort and file all correspondence in the back-office system.
4.	To answer the telephone within two rings in a polite and courteous manner and in line with company policy.
5.	To support the wider team with administrative tasks on a day-to-day basis, including the reconciliation of fees if required.
6.	To perform routine admin tasks as requested.
7.	To produce letters, invoices, forms and documents within agreed timescales.
8.	To prepare and submit relevant admin documents timely and accurately.
9.	To manage the accurate recording of information in the back-office system, including manual and electronic records, ensuring that all records are stored and processed securely and confidentially in full compliance with statutory requirements.
10.	To ensure all work produced is to the highest standard, in accordance with legislation.

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11.	To plan, manage and prioritise your own workflow and productivity to ensure personal and team targets and deadlines are achieved.
12.	To assist the Team Manager to identify ways to improve and develop the departmental and back-office systems, ensuring streamlined and accurate processing.
13.	To arrange appointments with clients and manage team diaries and travel arrangements accordingly. To look after clients in a friendly and professional manner, acting as ambassador for the team when required.
14.	To collate information accurately from clients and providers via telephone, email and other sources as appropriate; and ensure it is directed to the correct personnel in a timely manner.
15.	To deal with all communications in a timely manner and ensure they are of a high professional standard using David Allen brand guidelines and templates.
16.	To maintain your own knowledge by attending workshops and further training as advised.
17.	To ensure your studies are up to date and that you pass any assessments at first attempt.
18.	To manage and meet the requirements of your apprenticeship standard within the relevant timescale.

Central duties

19.	To represent the business when required to ensure positive links, relations and networks.
20.	To show a commitment to diversity, equal opportunities and anti-discriminatory practices.
21.	To undertake personal development necessary to ensure effective performance in the role.
22.	To participate in relevant and appropriate training and development as required.
23.	To undertake any other duties commensurate with the grade as appropriate.
24.	To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.