

**JOB DESCRIPTION AND PERSONAL SPECIFICATION
FOR THE ROLE OF**

MEMBER SERVICES CONSULTANT

| | |
|-----------------------|--|
| Report to: | Member Services Team Leader |
| Responsible for: | N/A |
| Main purpose of Role: | To act as point of contact for Members of the Society, and Financial Advisers (FAs) regarding general enquiries concerning the operation of the products, and the maintenance of personal and professional details within the Society's systems. |

Main Responsibilities and Duties

1. Deal with enquiries for all departments raised by Members or their Advisers on specific attributes of their contract held with the Society and ensure that all Members' details are maintained through the lifetime of their contract, handing off where necessary to subject matter expert.
2. Competently deal with enquiries by a variety of methods and managing all questions and other issues as they arise
3. Have the ability to multi-task, including, but not limited to, inbound and outbound calls, administration tasks directly emailed/posted to the Society.
4. Manage all contract amendments and financial correspondence (i.e. product replacement, change of occupation, reviewable exclusions, career breaks, arrears/ age band and indexation) and issue necessary paperwork, referrals to other departments and entry to the Society's systems.

Experience:

| Essential | Desirable |
|--|--|
| <ul style="list-style-type: none"> • Relevant experience in a similar role or with transferable expertise <p align="center">And / Or</p> <ul style="list-style-type: none"> • Experience of working successfully within a team | <ul style="list-style-type: none"> • Experience of working within the Financial Services sector |

Knowledge and Skills:

| Essential | Desirable |
|--|---|
| <ul style="list-style-type: none"> • Ability to communicate effectively with staff. • Attention to detail and accuracy while remaining calm under pressure. • Methodical and well organised | <ul style="list-style-type: none"> • Knowledge of the mutual business model. • Well-developed oral and written communication skills |

Education:

| Essential | Desirable |
|---|--|
| <ul style="list-style-type: none"> • Good standard of education with a minimum grade 'C' GCSE, or equivalent, in Maths and English | <ul style="list-style-type: none"> • Educated to A level or equivalent. |

Salary and Benefits:

| | |
|-----------------------------|---|
| Role Grade and Salary Band: | A |
| Pension: | 10% non-contributory |
| Performance Related Pay: | Maximum 10% of base salary based on agreed achieved KPI's and paid annually |
| Holiday: | 25 days plus public holidays |
| Core Hours of work: | Monday to Friday 8.45am to 5pm with one hour for lunch – 36.25 hours per week |
| Additional Benefits: | Death in Service cover of 4 x base salary Free onsite car parking Hybrid Working Private Health Cover from 3 months of employment Health Cash Plan Corporate Eye Care Package 2 Days paid leave per year for charity work |