



# Client Services Executive

**Department:** Operations, Novia Global

**Reports to:** Customer Services Manager

**Main Location:** Cambridge House, Henry Street, Bath – Office based

## About Novia Global:

Novia Global launched in 2015 and provides a platform service for Advisers, Private Banks, Trust Companies and their clients.

We are completely independent with a focus on providing a service that delivers the opportunity for growth, control, flexibility and adding value.

Through the platform, we offer access to a Global Investment Account and an International Self Invested Personal Pension (SIPP) with underlying assets include investment funds, exchange traded funds and shares.

For more information, please see [www.novia-global.com](http://www.novia-global.com)

## Job Summary/Purpose:

The primary focus of this role will be to support top tier advisor accounts with:

- > **Administration** – to provide administration support to Financial Adviser firms, Trust Companies and Clients.
- > **Customer Relations** – deal with any queries and requests from the Financial Advisers firms, Trust Companies, and on occasions, their clients.
- > **Escalations** – escalate any issues to Line Manager as necessary.

## Specialist Skills, Qualifications and Experience:

### Essential:

- > Excellent interpersonal and communication skills.
- > Ability to work well individually, and as part of a team.
- > Data processing skills.
- > Good attention to detail.
- > Self-motivated.
- > Work as part of a team to achieve team and personal objectives.
- > Willingness to learn.

### Desirable:

- > Have Wrap platform knowledge and/or experience, although on-the-job training will be provided.
- > Have experience working with Self Invested Personal Pensions (SIPPs).
- > Have a Financial Services qualification (E.g. IOC or CII).
- > An interest in financial markets and investments.

## Key Responsibilities:

- > Continually focus on delivery of excellent customer service to ensure that the Company is highly valued by our clients.
- > Ensure that the FCA Treating Customers Fairly (TCF) principles are adhered to, including raising any areas for concern with either Line Manager or Compliance.
- > Provide administration support across all areas of the Client Services function.
- > Process any external queries received via telephone, email or post.
- > Work as part of a team to ensure that all work gets completed within set Service Level Agreements (SLAs).
- > Manage risk effectively by informing Line Manager of any incidents, 'near misses' or exposures to our risk profile. Comply with all Company policies and report any risk concerns to Line Manager.

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

### **Core Competencies:**

- > **Performance Focus:** Demonstrate energy and enthusiasm, takes ownership, delivers results and improves personal performance.
- > **Expert Knowledge:** Consistent application of professional or specialist knowledge and skills; takes opportunities to contribute to policy and best practice.
- > **Team Work:** Working successfully with others and building a network of good relationships in order to achieve shared goals.
- > **Client Services:** Taking responsibility for client satisfaction and loyalty by effectively meeting specific client needs and developing and maintaining productive client relationships. Adhering to Treating Customers Fairly principles at all times.
- > **Communication:** Communicate clearly and concisely, tailoring content and style, with ability to make a positive impression on others.

To apply for this role, please email an up-to-date CV to [hr@novia-financial.co.uk](mailto:hr@novia-financial.co.uk).