Role Title: Front of House Executive (part-time)

Reports to: Director of Client Experience

Location: The job holder is based at MM Wealth's office in Girton, Cambridge

Job Purpose: To support our Clients, Directors, Financial Planners (FPs), Client Relationship Managers (CRMs) and Client Experience teams.

Main Duties:

- Liaising with Head of Client Experience to establish workloads and priorities.
- To ensure all meeting rooms are prepared in advance of meetings inc setting up associated technology as required. Provide beverages and/or lunch and ensure rooms are returned to their original state after use.
- Update and maintain whiteboard with daily meetings.
- Handle all enquiries in a professional manner (email or telephone), providing excellent service and addressing their needs effectively.
- Coordinate client meetings and manage FP/CRM calendars.
- Processing incoming post/deliveries distributing as appropriate. Processing outgoing post, including special deliveries.
- Process and manage client documentation i.e. Wills, Share Certificates, efficiently and accurately, that are received in the post.
- Reviewing and cleansing data on core systems (individually and/or in bulk) including exporting and manipulating data.
- Accurately preparing documents such as meeting packs and other ad hoc administrative tasks assigned.
- Completion of mass mailings as required, (post, email, via back-office system).
- To provide support, assistance and cover for colleagues as reasonably necessary to deliver the company objectives.
- Comply with the Education Policy.
- Comply with the relevant Conduct Rules, as per the Senior Managers & Certification Regime.
- Adhere to the Company handbook at all times.
- Adhere to compliance requirements and procedures as guided by Risk Management and the Financial Conduct Authority regulator (FCA).

Note: This job description is non contractual and is not exhaustive. It also may be added to or changed from time-to-time following discussions and consultation with the post holder and line manager.

MMWealth
Chartered Financial Planners

Personal Specification	Essential	Desirable
Skill	Ability to work using your own initiative. Proven track record in a direct client-facing role Problem-solving and decision-making abilities Excellent verbal and written communication skills, planning and organisation skills Experience in MS Office systems ie Word, Excel, Outlook	
Experience	Experience of working in a busy and dynamic office environment. Experience of managing a busy and varied workload. Experience of working to deadlines with changing priorities.	Experience in using a back-office system, e.g. Intelliflo.
Personal Quality	Self-motivated and pro-active. Ability to cope under pressure. Ability and willingness to maintain a professional standard. Positive can-do work ethic.	
Qualifications & Training	Willingness to achieve and maintain a level of competence as required by the business. Complete all training prescribed by the firm within the timescales given. Adhere to compliance requirements and procedures as guided by Risk Management and the Financial Conduct Authority regulator (FCA).	