

# We're hiring...



## **The Role: Client Relations Associate**

The role of the Client Relations Associate is an administrative role to support the Financial Planners in the delivery of clients' financial plans.

With a passion to want to deliver an exceptional service to our clients to ensure they live their very best lives through creativity and excellent financial planning. Our mission is to get all of our clients talking about their boost experience with their friends and family so they too want to join the boost family!

## **What you can expect:**

### **Challenge**

Our internal desire to be as good as we can be, means that constant personal growth and improvement is an expectation. You can expect to be challenged to improve everything that you touch - and you can look forward to support from the boost team as you grow and flourish.

### **The working environment is rather special**

Passers-by can be forgiven for confusing our lakeside office for a boutique spa. We have no doubt that you'll quickly settle into your new home. Our rural location means that parking is free and you'll have use of our electric car chargers.

### **If it's worth doing, we do it properly**

If something will improve the day-to-day life of our team, we are not afraid to spend money on it. You can expect IT that fits your working needs and technology that 'just works'

### **Building deeper relationships**

We work together as a team, learn from each other, and have fun. That camaraderie is also expanded beyond work projects into regular team events, marathon relays (optional!) and charity days.

### **We value your wellness**

We don't like to see our team working evenings but that doesn't mean you have to leave... you can always pop next door to the boost gym. Our appointed Wellness Ambassadors are in charge of all things wellness... from activity challenges to home pamper kits. Your wellness is our priority.

## **The opportunity:**

- To develop into our cashflow specialist with coaching, mentoring and oversight responsibilities as the business continues to grow.
- To become the Protection champion within boost.
- boost is dedicated to growing it's people, the investment and remuneration rewards on meeting qualification milestones is clearly laid out in personalised development pathways

### **The responsibilities:**

- Analysing client data and working within a team to prepare financial plans
- Following our onboarding process to ensure all clients' first experience of boost is top quality
- Ensuring that all regulatory and compliance standards are met
- Liaising with product providers and other relevant third parties
- Ensuring client needs are met to an exceptional standard, including:
  - Ensuring that all client requirements are followed through in a timely manner to the appropriate conclusion
  - Focusing on improving all clients' outcomes
  - Working within the parameters of the boost processes and constantly looking for ways in which to improve efficiency
  - Attending client meetings when relevant to do so
- Joining client meetings to support the Financial Planners
- Continual Professional Development
- Keeping up to date with legislative and industry changes which affect the business and its' clients
- Keeping internal briefing notes up to date, with the support of the Financial Planners and other members of the technical team
- Working within the team to aid boost in meeting its objectives

### **The 'must haves':**

The successful candidate will have:

- Attained, or be working towards Level 4 Diploma in Financial Planning
- Experience of using cashflow tools, ideally Truth
- Excellent communication, spelling, grammar, accuracy
- Experience of working within financial planning
- At least 18 months experience of working in financial services, ideally financial planning
- The drive to seek opportunities and highlight these to the planner
- Motivation and excellent time management skills
- Ability to think outside the box, for the right outcome!

### **The 'nice to haves':**

- Experience of Apple hardware & software
- Experience of Intelligent Office CRM
- Experience of FE Analytics
- Good protection knowledge

### **The benefits:**

- Competitive salary and pension contribution
- Competitive productivity bonus, in which all team members are included
- Group Death in Service & Private Medical Insurance
- 22 days holiday, increasing annually, up to 27 days upon 5 years service, plus bank holidays

## The non-monetary rewards ....

- All professional memberships, relevant conferences, studies and exams fully-funded by boost
- Monthly internal training sessions to ensure the continued development of our team
- Healthy team social and wellness budgets for the whole team to enjoy

## About boost

- boost Limited are a family run firm of Certified Financial Planners based in the Bedfordshire countryside in our beautiful, purpose-built, lakeside eco-office, close to Milton Keynes and M1 Junction 13
- We are a multi-award winning CISI Accredited Firm and hold British Standards BS8577 & BS8543, along with all financial planners certified to ISO22222
- Our qualifications, accreditations and awards show our dedication to investment in our people and processes for the benefit of our fans, our clients.

## Core values

- boost prides itself on the service it delivers to its clients. With excellence at the heart of all we do, we constantly strive to improve our documents, systems and processes to achieve greater outcomes for our clients.
- With a desire to see our clients live their very best lives, the successful candidate will have a passion for excellent outcomes and doing the right thing.
- Within the small team of boost, close collaboration is vital and communicating effectively, clearly and concisely is crucial to make the team run smoothly.
- boost is incredibly open about the objectives of both the business and the shareholders. We believe accountability is the best way to achieve objectives and goals, so we love to hear about our teams' personal goals, support them throughout, and celebrate with them when they are achieved!

Contact [jennie@boost.financial](mailto:jennie@boost.financial) to learn more and apply

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