



Job Description

Title	Client Relationship Officer (Loan Matching)
Short description	Client Relationship Officer
Base	Based in Launceston
Reporting To	Client Relationship Manager: Loan Matching
Salary	£22,000 (depending on experience)
Hours	Monday to Friday 37.5 hours per week

Responsibilities

To be the first point of contact to clients providing concise and consistent information relating to services both to lenders and borrowers.

Key Accountabilities for Loan Processing

Customer contact:

- Act as the first point of contact for clients and introducers contacting the business. Both face to face and by telephone.
- Ability to explain in detail and with confidence the lender and borrower propositions to clients and introducers.
- Book appointments for clients with relevant managers within the Client Services team.
- Identify opportunities for attracting new clients.
- Conduct face to face client interviews as required.



Administrative duties:

- Maintaining and updating the bespoke business system for recording client and introducer data.
- Initiating correspondence to clients by email or in writing.
- Following up client enquiries by telephone.
- Maintaining accurate documentation /files relating to client records.
- Ensure that FCA compliance and other financial regulations are adhered to.
- Make sure that any sensitive data is collected and recorded according to GDPR.

Miscellaneous: Any other duties as required.

Knowledge and skills:

Microsoft Office skills: Word, Excel and PowerPoint

Face to face customer experience

Excellent written and verbal communication

Understanding of the employer's business to business lending model/ethos

Commercial/financial awareness

Key Competencies:

Customer Focus

Teamwork/Collaboration

Responsibility and leadership

Expertise and attention to detail

Minimum of 12 months experience within the financial services or banking sector (essential)

How to apply?

For an application form and job description please contact **Angela Stuart** at **A S Recruiting Ltd** via email angela@asrecruiting.co.uk or Telephone on **01579 370488** or **07747 022148**.

Please quote Job Reference Number **AS/12044**

Closing date for application

Thursday, 28th February 2019



A S Recruiting
Your future is our future

A S Recruiting Ltd
Fernleigh, Bray Shop, Callington, Cornwall, PL17 8PZ
Tel — 01579 370 488
Mobile — 07747 022 148
Email — info@asrecruiting.co.uk