

JOB DESCRIPTION

Name:

Job Title: Tax & Technical Support Consultant

Level: 4

Reporting to: Head of Technical Support - Asia

Last updated:

1. Main Purpose of the Role

- To provide technical, marketing, best advice and general support in relation to the products and services offered by St. James's Place. This will be predominantly to members of the St. James's Place Partnership and provided through a variety of means including telephone, email and face to face communications
- Contribute towards the development and implementation of products and services within both Technical Support and other teams within Business Development
- Continue to develop expertise and knowledge in the relevant Wealth Management fields, together with products and services offered by other providers in the market and keep up to date with current market issues
- Assist in the design, development, launch and maintenance of Technical Support literature designed to support client acquisition, advice and product sales
- To provide Technical Training for Partners and Advisers.
- Respond to enquiries from Partners in a timely manner
- Attend client meetings to provide technical support
- Host webinars, seminars and other events in conjunction with Marketing
- Establish and build relationships with key personnel within other SJP Departments, admin centres and 3rd party providers
- Promote the St. James's Place culture in all aspects of the role to maintain the reputation of the team, for example:
 - Responsible for ensuring the output of work is in line with our values and principles of treating our clients fairly (being both our internal (Partner) clients and external clients). Day to day business activities to include (where appropriate): Making decisions with clients' best interests in mind
 - Create processes that meet the needs of our clients efficiently and effectively
 - Escalate anything not believed to be in line with the Company's values of treating customers fairly
 - Use documents that are clear, easy to understand and avoid jargon
 - Keep Partners, colleagues and third parties suitably informed within appropriate timescales
 - Give suitable advice which takes into account customer's circumstances
 - Carry out all business with integrity and professionalism

2. Main Functions of the Role

2.1 Legal and Regulatory Compliance

- Ensure St. James's Place principles, standards and relevant regulations and legislation are upheld when providing technical support
- To provide advice and comment to the Client Liaison and Business Assurance departments where complaints / issues are of a suitability or technical nature
- Follow agreed industry and company standards

2.2 Communications/Interfaces

- First point of contact will be the Head of Technical Support - Asia
- Business Development Division:
 - To participate in the development of new product and services, as well as enhancing those already provided by Technical Support
 - Contribute to the production of a business case for new products / services, including conducting research and surveys
 - Keep abreast of developments in the relevant Wealth Management field, including latest legislation and case law, by reading industry journals and attending relevant seminars / workshops
- Cirencester Divisions, third party relationships & Asia based Support Teams:
 - To deal on a day-to-day basis with specific technical, suitability and advice based queries from Business Development and other Head Office or local departments
 - To participate in corporate projects and committees
 - Build strong working relationships with the professional firms with whom we have business relationships
- The Partnership:
 - To participate in the operation of the Technical Support Function through the provision of services to Partners
 - Assist Partners in the implementation of financial based solutions for clients
 - To provide support to Partners via face to face meetings, workshops, audio conferences, email, telephone or other media as required.
 - To provide support in relation to Private Client advice
 - To provide UK tax advice specific to individual client circumstances and complete UK individual tax returns as appropriate
- Field Management Teams
 - Provide Technical support to the FMT
 - Provide the Technical input in respect of the Partnership Development Program

- Assist the BAT as required – new recruit meetings & participation in the Wealth Management course

Responsibilities and decision making

- Responsible for ensuring that the main functions / purposes / general tasks of the job are carried out in accordance with agreed target dates and within regulatory timescales where applicable
- To exercise judgement in the way in the which duties are performed and, where necessary, seek guidance
- To follow agreed standards in respect of all communications
- To observe documented procedures in respect of concession requests.

2.4 Business/Partner Development

- Provision of product technical support to the Partnership
- Contribute to discussions on team procedures and approach

2.5 Qualifications

- A member of the Association of Taxation Technicians (ATT)
- Develop technical skills by taking further exams where appropriate

3. Personal Attributes

3.1 Experienced Required

- Proven ability to learn and apply technical information
- Sound understanding of the advice process and UK taxation regime.

3.2 Skills and Behaviours Required

- Strong interpersonal and communication skills with the ability to be innovative and creative
- Ability to adapt communication style depending on needs of others
- Willingness to further develop technical and market knowledge
- Flexible, pro-active approach
- Strong work ethic and sense of personal responsibility
- Uphold the brand through strong relationships with others (both internal and external)
- Manage own workloads to ensure deadlines are met whilst maintaining awareness of the team responsibilities and tasks
- Comfortable working alone and as part of a team

