

Hargreaves Lansdown Role Profile and Person Specification

Role Profile	
Job Title: Pensions Consultant	Hours of Work: Average 41 hours per week in 8 hour shifts between 8am and 8pm Monday to Friday and 9.30am-12.30pm one in three Saturdays
Department: Pensions Helpdesk Starting Salary: £21,000 basic + Overtime + potential for discretionary bonus	Reporting To: Head of Pensions Helpdesks

Summary:

Hargreaves Lansdown is the UK's largest SIPP provider, (non-advised) drawdown provider, and annuity broker. The Pensions Helpdesk is the client facing part of the Company for all our SIPP, drawdown and annuity clients.

Working on the Pensions Helpdesk you will be responsible for answering any questions our clients may have. Pensions Consultants will build knowledge of legislation and taxation and will be required to explain the relevance and consequences of complex rules and procedures to our clients in plain English. A strong understanding of investments (specifically shares, funds, Investment Trusts, ETFs corporate bonds and gilts) is also required. Full training will be provided.

As the Helpdesk will be approached by a wide range of people – from Chartered Accountants and Financial Advisers to first-time investors – it is vital Consultants tailor their response to queries appropriately. The role will allow you to develop exceptional client communication skills.

You will also produce illustrations and liaise with other companies on our clients' behalf.

The role represents an excellent chance to gain a good understanding of the Company as a whole, as you will work closely with a range of internal teams including Marketing, Stockbrokers, our Financial Advisers and our Corporate arm.

There is the opportunity to start or continue personal professional development for those who wish to gain industry recognised qualifications.

Key Duties & Responsibilities

- Answer incoming telephone enquiries.
- Reply to client letters and emails.
- Meet clients face to face
- Liaise with third parties on clients' behalf.
- Produce retirement illustrations
- Ensure Clients are treated fairly, in accordance with regulatory guidelines.
- Refer any instances of client dissatisfaction or suspicion of money-laundering appropriately
- Preserve our reputation for excellence built up within the industry.
- Proactively look for ways to improve the quality and profitability of the products and services we offer our clients.

Person Specification:		
	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> • Good A-Level Qualifications (grade C or above) or equivalent 	<ul style="list-style-type: none"> • Degree (at least 2:2) or equivalent • FPC or Regulated Diploma Qualified (or currently working towards)
Knowledge		<ul style="list-style-type: none"> • Basic investment knowledge • Basic pensions knowledge
Experience		<ul style="list-style-type: none"> • Experience in a client facing role
Competencies	<ul style="list-style-type: none"> • Excellent oral communication skills • Excellent written communication skills • Numerate • Proficient with MS Office • Ability to multitask • Ability to prioritise workload • Keen eye for detail • Ability to stay professional under pressure 	<ul style="list-style-type: none"> • Capable of working independently • Good time management skills
Attributes	<ul style="list-style-type: none"> • Hardworking • Polite and courteous. • Professional appearance • Dependable • Ability to work in a team or individually 	<ul style="list-style-type: none"> • Innovative • Desire to develop professionally • Willing to put in extra hours when required • Problem solving skills

Written by: **Head of Pensions Helpdesks**

Authorised by: **Head of Pensions**

Date: **September 2014**