

Hargreaves Lansdown, Role Profile and Person Specification

Role Profile

Job Title: Investment Helpdesk Consultant	Hours of Work: Helpdesks opening hours are 8am-7pm Mon to Thur, 8am-6pm Fridays and 9.30am-12.30pm Saturdays. Will work 40 hours per week, Mon-Fri on rotating shifts & Saturday mornings on a Rota basis.
Salary: £21,000 + Overtime and Discretionary Bonus Scheme	Reporting To: Investment Helpdesk Manager

Summary:

The Investment Helpdesk deals with a broad range of enquiries on the main investment products and services that Hargreaves Lansdown offer. This will include queries on ISAs, unit trusts/OEICs, shares, VCTs and Investment Bonds. It is primarily a telephone based role, but queries can also be addressed by email, letter and occasionally face to face.

Key Duties & Responsibilities

- Primarily taking incoming telephone enquiries from investors on both new and existing business.
- Must obtain generic product & regulatory knowledge, together with knowledge of services that we offer at Hargreaves Lansdown (full training will be given).
- Expected to be able to explain the relevance and consequences of various complex rules and procedures to our clients in plain English.
- Required to work closely with a range of teams internally, including Marketing, Stockbrokers, Administration and Financial Advisors to successfully resolve a client's enquiry.
- Must adhere to FCA regulations. Will not be authorised to offer any bespoke investment advice.
- Must uphold Company standards in relation to dealing with clients and enquiries.
- Encouraged to be proactive in passing on feedback from clients to help the Company evaluate and develop its services.

Career Development

- The initial training program will cover a range of different areas, including; retail investment products, taxation of investments, investment administration, legislation and financial regulation. During this training the candidate will develop a wide understanding of how financial markets operate and the extent of participation of retail investment in UK financial markets. The candidate will also receive support to develop the time management, problem solving and inter-personal skills expected from an Investment Helpdesk Consultant at one of the UK's leading financial services providers.
- The candidate will also receive training on all Hargreaves Lansdown services and relevant procedures, products and internal systems.
- Upon passing the probationary period the candidate will be expected to pass the CISI IOC Introduction to Securities and Investments.
- After completion of the above the candidate will then be encouraged to pursue industry recognised qualifications such as the IMC or CII Diploma in Regulated Financial Planning.

Person Specification:

	Essential	Desirable
Qualifications	A Levels, grade C or above (or equivalent)	Degree level 2:1 or above in any discipline Any business/financial services related qualification.
Knowledge	Basic computer literacy. Knowledge of products and services offered by Hargreaves Lansdown.	Basic knowledge of financial services. Understanding of products and services offered by Hargreaves Lansdown. Competent computer user; proficient with Microsoft office and using in-house systems.
Experience	None required.	Any relevant experience (e.g. Working in an office, customer service role etc.). Experience of financial services. Experience of holding positions of responsibility (work or non-work related).
Competencies	Good communication skills. Good telephone manner. Good written and numeracy skills. Excellent attention to detail. Good organisational skills. Ability to perform under pressure. Ability to work within FCA regulations.	Excellent communication skills. Confident, accomplished telephone manner. Excellent written and numeracy skills. Ability to prioritise workload and meet deadlines. Problem solving skills. Analytical skills. Ability to use initiative.
Attributes	Hardworking. Client satisfaction orientated. Patient, reliable, conscientious and trustworthy. Professional, presentable appearance. Pro-active and positive. Team player. Sense of pride from doing a good job.	Genuine interest in financial services. Willingness to learn and desire to develop professionally. Desire to contribute to the Company's success and uphold its exceptional reputation. Entrepreneurial. Proven desire to succeed (via evidence of personal/recreational/sporting achievements).