

## Hargreaves Lansdown, Role Profile and Person Specification

### Role Profile

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| <b>Job Title: Corporate Relationship Manager</b> | <b>Hours of Work: Mon – Fri, 37.5 hours per week.</b> |
| <b>Salary: Up to £60,000 p.a.</b>                | <b>Reporting To: Head of Corporate Solutions</b>      |

#### Summary:

We are looking for a Corporate Relationship Manager to work within our established Retirement Service team. The individual will be responsible for working with existing clients to ensure that the Retirement Income Options for their company pension scheme members is appropriate, in line with legislative requirements and in line with their own pension scheme requirements. You will be given a book of clients and will be the assigned contact responsible for them, ensuring services offered and processes provided are efficient and compliant.

You will be heavily involved with Retirement Income provision (this includes both Annuities and Income Drawdown) and will be working with our clients on their “at retirement” requirements. The recent changes as a result of the Budget and the options pension scheme members have will need to be clearly established within each client's processes. You will also be involved with the on-going governance of their Retirement Income provision as well as the on-going servicing of the client.

You may need to provide guidance on other areas such as Financial Advice and Pension Transfers and will be responsible for introducing the relevant people to ensure the client receives appropriate advice.

You will be a self-starter and expected to develop and own client relationships including managing any issues.

#### Key Duties & Responsibilities

- To provide on-going servicing and support to existing Corporate Clients on their Retirement Income Provision including Annuities, Income Drawdown and Advisory options (if applicable).
- Service existing portfolio of corporate Retirement clients, – this includes annual reviews with employers are delivered (where appropriate) and recorded and help secure additional business for the Group and enhance the relationship
- Liaise with Retirement service Administration and Processing teams to ensure each account is running smoothly
- To operate at all times in a highly professional and ethical manner, reflecting the ethos of HLCS, and the spirit of “Treating Clients Fairly”
- Deliver presentations to Trustees and Governance Committees on the market, developments, regulatory requirements and feedback on the service provided and suggestions for improvements/developments
- Work with Marketing team to ensure consistent issues/themes are used for sales initiatives
- Provide reporting to confirm any actions taken and current position of each scheme
- Maintain up to date knowledge of developments within HLCS and in the Corporate Marketplace to help improve the proposition, as well as ongoing professional development

### Person Specification:

|                       | Essential  | Desirable   |
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| <b>Qualifications</b> | <ul style="list-style-type: none"><li>• A degree of any discipline</li><li>• Diploma in Financial Planning (or equivalent)</li></ul>   |   |
| <b>Knowledge</b>      | <ul style="list-style-type: none"><li>• Good knowledge of the “at Retirement” market and decumulation options</li><li>• Good understanding of Annuities</li><li>• Understanding of Income Drawdown</li><li>• Understanding of Trust and Contract based Pension Schemes</li></ul> | <ul style="list-style-type: none"><li>• A knowledge of Retirement Income options, Pensions and Flexible benefits in general</li></ul> |

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|                     | <ul style="list-style-type: none"> <li>• Understanding of Final Salary Pension Schemes</li> <li>• Competent computer user; proficient with Microsoft office</li> </ul>   |   |
| <b>Experience</b>   | <ul style="list-style-type: none"> <li>• At least 3 years' experience working within a Corporate Pension/Retirement environment</li> </ul>   | <ul style="list-style-type: none"> <li>• 5 or more years' experience working within a Corporate Pension/Retirement environment</li> </ul> |
| <b>Competencies</b> | <ul style="list-style-type: none"> <li>• Excellent written and numeracy skills</li> <li>• Confident in front of clients</li> <li>• Ability to prioritise workload and meet deadlines</li> <li>• Ability to use initiative</li> <li>• Ability to communicate technical issues to a non-specialist audience</li> </ul> |   |
| <b>Attributes</b>   | <ul style="list-style-type: none"> <li>• Exceptional presentation skills</li> <li>• Pro-active</li> <li>• Resourceful and positive attitude</li> <li>• Willing to take responsibility for the quality of your own work</li> <li>• Ability to work under pressure, especially at busy times of the year</li> </ul>    | <ul style="list-style-type: none"> <li>• A desire to succeed and progress professionally.</li> <li>• Commercial awareness</li> </ul>      |