WEALTH at work

KNOWLEDGE | EXPERIENCE | OPPORTUNITY

client relationship manager (pensions).

Job summary

To effectively manage corporate client relationships and ensure successful implementation of educational, advice and workplace savings and investment platform services, including pensions and ISAs. To successfully up sell and cross sell to these clients to ensure profitable client relationships.

Core responsibilities

- Manage client relationships to ensure revenue growth and enquiry generation for advice service
- To provide technical pension support for new business development activities
- To keep up to date on changing legislation ie pensions/tax
- Produce ideas for employee communications e.g. changes to pension & share schemes
- Responsibility for drafting client business proposals
- Develop project implementation plans in consultation with delivery team members
- Thorough understanding of pensions administrations for platform implementation
- Responsibility for formally reviewing project delivery against agreed success criteria
- Take responsibility for client proposals, project implementations and reviews with particular focus on pensions
- To ensure contracts are managed and extended where possible
- Manage relationships with EBCs & respond to RFPs

Desirable skills/experience

- Strong financial services background, including extensive UK pension knowledge relating to:
    - defined benefit schemes
    - defined contribution schemes
    - auto-enrolment
- Project management skills
- Experience of managing benefits education and communication particularly in the pensions and retirement space
- Experience of having delivered education programmes in the workplace e.g. pension/retirement seminars

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- Understanding of benefit provision and how it is delivered e.g. benefit/pension platforms
- Experience of benefits provision including pensions from both a client and provider (consultancy) perspective
- Appreciation of how benefit/pension functions operate from a technical and operational perspective e.g. salary sacrifice, trustees, compliance
- Proven sales experience in a client relationship role within the financial services B2B space
- Good understanding of business processes, including knowledge of financial management and understanding of strategy/forward planning within own and clients' organisations
- Excellent influencing and interpersonal skills
- Clear and confident written and verbal communication skills with an ability to articulate complex ideas, concepts and solutions both internally and externally
- Ability to work to deadlines with proven time management skills
- Proactive team player

Essential qualifications

- Full FPC or equivalent

Desirable qualifications

- Diploma in financial planning – pension income options (JO5) or
- Diploma in regulated financial planning – Pensions and retirement planning (RO4)