

Job Description



Job Title	Savings Assistant	
Date & Version	October 2025	Version: 4.0
Reports to:	Savings Team Manager	
Direct Reports:	None	
Produced by:	HR Operations Manager	



Leek, St Edward Street



Full time, 12 Month Fixed Term



35 hours

Job, purpose and scope

To provide efficient and accurate operational support for savings activities across the Society, ensuring customer records, account documentation and associated processes are completed to a high standard. The role works collaboratively with branch and central teams to deliver a positive customer experience whilst maintaining regulatory and procedural compliance.

Duties and key responsibilities

Customer Service

- Deal accurately and efficiently with savings enquiries from customers, colleagues and third parties through a range of communication channels, including telephone, correspondence and digital methods.
- Process and administer savings accounts in line with customer instructions, Society procedures and regulatory requirements.
- Co-ordinate and process customer mailings accurately and within agreed service standards.
- Review savings documentation on a daily basis to ensure accuracy, completeness and compliance with Society procedures, resolving issues where appropriate and working collaboratively with branch colleagues to improve quality standards and help prevent recurring issues across processes such as new account applications, additions of names and Power of Attorney registrations.
- Maintain accurate customer and account records across all relevant systems.
- Keep up to date with changes to savings products, processes, procedures and regulations.
- Contribute to the achievement of individual, team and departmental objectives.
- Identify opportunities to improve processes, customer outcomes and operational efficiency, supporting the implementation of agreed improvements and administrative activities.

Duties and key responsibilities

Risk Management

- Adhere to Society policies, procedures and risk management frameworks at all times.
- Identify, report and appropriately escalate risks, incidents and control weaknesses in accordance with Society requirements.
- Comply with all applicable regulatory, legal and internal policy requirements.
- Understand and promote a positive risk culture and the role individual actions play in protecting customers and the Society.

Society Ambassador

- Demonstrate the Society's values through everyday interactions with customers, colleagues and stakeholders.
- Collaborate positively and respectfully with colleagues across the Society.
- Take ownership of responsibilities and contribute constructively to team success.
- Be open to change and support continuous improvement initiatives.
- Act as a positive representative of the Society in all professional interactions.

Self-development

- Take ownership of personal development through regular participation in one-to-ones, development conversations and learning activities.
- Maintain required knowledge and skills by completing mandatory training and participating in relevant development opportunities.
- Seek and act on feedback to support continuous professional growth.

General

- Undertake any other duties that are reasonably aligned with the purpose, responsibility and level of the role.

Conduct Obligations

Conduct Rules

All employees and NEDs are expected to act in accordance with the PRA and FCA Conduct Rules:

- You must act with integrity.
- You must act with due skill, care and diligence.
- You must be open and co-operative with the FCA, the PRA and other regulators.
- You must pay due regard to the interests of customers and treat them fairly.
- You must observe proper standards of market conduct.
- You must act to deliver good outcomes for retail customers.

Financial Crime

All employees and NEDs are expected to:

- Be aware of their personal legal obligations and the legal obligations of the Society in relation to Financial Crime
- Be aware of the Society's Anti-Money Laundering systems and controls and follow the Society's procedures
- Be alert for anything suspicious in respect of money laundering or fraud and report any suspicions in line with internal procedures
- Do not discuss any suspicions with anyone outside of the Society and do not 'tip off' a customer or prejudice an investigation

Person Specification

Qualifications and knowledge	Essential ▪ Good working knowledge of Microsoft Office applications, including Outlook, Word and Excel. ▪ Understanding of the importance of maintaining confidentiality, accuracy and compliance within an administrative or customer service environment. ▪ Commitment to completing all required regulatory and compliance training. Desirable ▪ Knowledge of savings products and financial services administration. ▪ Awareness of regulatory requirements relevant to financial services, including Anti-Money Laundering and Data Protection. ▪ Understanding of customer service standards and fair customer outcomes.
Experience	Essential ▪ Experience of working in a customer service, administration or operational support environment. ▪ Experience of processing information accurately and maintaining records. ▪ Experience of contributing positively to team objectives. Desirable ▪ Experience of working within a regulated environment. ▪ Experience of financial services or savings administration. ▪ Experience of identifying and implementing process improvements.
Skills and abilities	Essential ▪ Strong attention to detail and commitment to accuracy. ▪ Good numeracy and written communication skills. ▪ Ability to communicate effectively and professionally with customers and colleagues. ▪ Ability to organise, prioritise and manage workload effectively. ▪ Ability to work collaboratively as part of a team whilst taking ownership of individual responsibilities. ▪ Ability to use judgement to identify and resolve routine issues. ▪ Confidence using Microsoft Office applications and business systems. ▪ Commitment to delivering positive customer outcomes. Desirable ▪ Experience of using customer administration or account management systems. ▪ Intermediate Excel skills.
Other requirements	▪ Willingness to participate in the department's Saturday rota. ▪ Flexibility to support departmental requirements during peak periods where reasonable and agreed. ▪ Commitment to the Society's values and ways of working.

