

# Job Description



<b>Job Title:</b>	Savings Assistant	
<b>Date &amp; Version</b>	November 2024	Version: 3.0
<b>Reports to:</b>	Savings Team Manager	
<b>Direct Reports:</b>	None	
<b>Produced by:</b>	Head of Branch Network and Customer Support	

## Job, purpose and scope

To support our savings members by processing customers' requests received by post, phone or through our digital channel. By actioning requests accurately and within agreed service levels you'll be ensuring our members receive great experiences.

The range of tasks are many and varied so flexibility and a willingness to learn new processes and be a team player are essential to ensure success of the team and deliver our core business values

## Duties and key responsibilities

### Customer Service

- Deal accurately and efficiently with Savings enquiries from customers, other Society Departments, other financial services organisations, branches over the telephone and by correspondence, whether by post or electronically.
- Accurately process and administer Savings accounts in line with customer instructions and the Society's processes and policies.
- Co-ordinate and process mailings to customers in an accurate and timely manner.
- Check the accuracy of savings documentation on a daily basis and where appropriate feedback to the respective branch e.g. errors made on new applications, addition of names, power of attorney.
- Keep abreast of changes in Savings accounts, procedures and regulation.
- Achieve individual objectives, supporting the achievement of Savings Department objectives and thereby contributing to the overall success of the Society.
- Support and improve the Savings activity of the Society e.g. Process improvements, Passbook and stationery ordering, update of application forms.

### Risk Management

- Adhere to the Society's policies and procedures at all times to mitigate risk.
- Identify and report risk events in accordance with the Risk Management Policy.
- Comply with all regulatory requirements.
- Understand the importance of a risk culture as it applies to the Savings Assistant role.

## Duties and key responsibilities

### Society Ambassador

- Embrace and work in line with the Society's core values.
- Work as part of a team providing flexibility where required.
- Ability to work on own initiative
- Receptive of and willing to embrace change.
- Present a professional image at all times.

### Self-development

- Take ownership of your own development by actively participating in 1-2-1's and Personal Development Reviews.
- Keep up to date with training requirements including e-learning and attending training courses where required.

### General

- Any other duties that may reasonably be required

## 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 Specifications

<p><b>Qualifications and knowledge</b></p>	<ul style="list-style-type: none"> <li>• Knowledge of all parts of the Microsoft Office suite.</li> </ul> <p>Regulatory Knowledge (Internal Training Provided):</p> <ul style="list-style-type: none"> <li>• TCF/Conduct Risk</li> <li>• FCA Regulation – BCOBS &amp; Senior Manager Regime/Certification Regime/Conduct Rules</li> <li>• Anti-Money Laundering</li> <li>• Data Protection Act</li> <li>• Equality Act / Equal Opportunities</li> <li>• Complaints Procedure</li> <li>• Health and Safety</li> </ul>
<p><b>Experience</b></p>	<ul style="list-style-type: none"> <li>• Experience of working in a customer service environment.</li> <li>• Experience of contributing effectively to a team.</li> <li>• Experience of working to challenging objectives is desirable but not essential.</li> <li>• Previous experience of working in a financial services environment is desirable, but not essential.</li> </ul>
<p><b>Skills and abilities</b></p>	<ul style="list-style-type: none"> <li>• Good level of numeracy and literacy skills.</li> <li>• Ability to communicate effectively across multiple channels to support customer outcomes.</li> <li>• Excellent customer service skills.</li> <li>• Organisational and time management skills.</li> <li>• Ability to work effectively as part of a team and use own initiative.</li> <li>• Ability to take a proactive approach to work.</li> <li>• Previous experience of Microsoft Word/Excel.</li> </ul>
<p><b>Other requirements</b></p>	<ul style="list-style-type: none"> <li>• Willingness to work on a rota'd basis on a Saturday and occasionally work outside standard opening hours to support departmental objectives is required</li> </ul>

