

KEY PARTNERSHIPS LTD

JOB DESCRIPTION

Job Title	ESTATE PLANNER
Department	KEY PARTNERSHIPS
Reports To	OPERATIONS MANAGER
Location	HEAD OFFICE, PRESTON
Job Purpose	
<ul style="list-style-type: none"> • To effectively convert interested clients to proceed in arranging Wills, Lasting Powers of Attorneys, discuss and sell relevant trusts and ancillary products and services. • To maintain that all regulatory obligations are met (where required) as well as maintaining the established standards required. 	
Principal Accountabilities	
<ul style="list-style-type: none"> • Outbound calls to clients who have expressed an interest in specific Estate Planning Services • Answering inbound calls which are to request the services directly • Advising customers regarding their full estate planning requirements • Data Input, and producing the necessary legally binding documentation • Producing / processing quotations with prospective clients and processing their payments • Liaising with internal customers • Achieving weekly / monthly targets with regard to sales and up-selling opportunities • Meeting minimum standard sales and Key Performance Indicators 	

Person Specification

Experience	<ul style="list-style-type: none">• A financial background
	<ul style="list-style-type: none">• Consultative sales experience• Estate Planning knowledge is desirable but not essential• Experienced telesales operative, preferably with inbound/outbound experience• Proven track record in sales

Personal Qualities / Competence	<ul style="list-style-type: none">• An individual with strong communication skills• Confident and outgoing
	<ul style="list-style-type: none">• A self starter• Team Player• Good organisational skills• High level of accuracy & literacy• High standard of PC skills • Empathic to the clients needs• Ability to maximise Sales opportunities

Company Benefits

- Competitive Salary
- Bonus Scheme
- Stakeholder Pension Scheme
- 20 days holidays pa, increasing to a maximum of 27 days on length of service
- Subsidised gym membership
- Childcare Vouchers scheme
- Life Assurance