

Job description

Job title	Call Centre Associate
Reports to	Call Centre Manager
Location	Basingstoke
Job purpose summary	To answer inbound investment query and application calls

Key responsibilities and accountabilities

- Receive inbound calls from clients enquiring about Castle Trust investment products
- Placing investment trades on behalf of clients and setting up client accounts in the system
- Deal with investment queries, website questions and help clients complete the application process
- Talk through complex investment processes with prospective clients
- Make account amendments where required
- Engage with customers and provide excellent customer service and brand representation.

Key competencies

- Communication and Influence
- Customer Service
- Technical Skills and Knowledge.

Qualifications and experience

- Strong customer focus
- Good telephone manner
- Experience in investment administration.