

## Role specification.

### Role Title:

Region(s)	Head Office (Manchester Green) , Working from home during COVID restrictions
Reports to	Customer Service Manager
Contact	Rosie Parker rosie.parker@assetzcapital.co.uk
Salary	Competitive salary + benefits

### Role Purpose

As a Customer Service Officer, you will join a professional, motivated, and committed team, who act as the main point of contact for all retail investors and provide ad hoc assistance for processing other external customer queries.

You will deal with new and existing investors, over the telephone, e-mail and web chat and play a key role in supporting the Company in achieving its monthly investor targets.

### Responsibilities

- Speak to, and deal with, prospective and existing customers both on a proactive and reactive basis
- Assistance with completion of Know Your Customer and Anti Money Laundering checks
- Build rapport with your own allocated group of investor clients to cultivate trust in order to maintain and or increase investment on the Assetz Capital platform.
- Identifying customer needs and requirements and preparing them for the use of the platform.
- Maintain a high level of conversion of newly registered investors to becoming FCA active investors.
- Provide support when required to deal with inbound calls enquiries, resolving the enquiry on the call where possible. If not possible, resolve the within agreed SLA.
- Provide support when required to, deal with and respond to email enquiries from investors and correspond with investors via web chat.
- For all customer interaction, input accurate and up to date notes on to the investors account.
- Keep a record of any issues, or FAQ's, and their resolutions. Use this information to populate the FAQ section of the website.
- Confirm investor withdrawals requests, including high level withdrawals which require phone confirmation.
- Maintain a high level of knowledge of the workings of the platform, in particular investing in loans or accounts. Be able to answer any questions raised by investors about the workings of the platform.

- Flag and report any errors, inconsistencies or confusing information that is visible on the platform so that remedial action can be taken.
- Investigate and resolve account queries raised by investors or raise issues with the relevant team in a timely fashion and within SLA.
- Provide support to resolve customer complaints or address negative feedback.
- Adhere to all Company policies and procedures.
- Be a role model by doing things wholeheartedly, communicating with passion and enthusiasm.
- Any other duties/projects as required relevant to the investor team.

## Skills and knowledge

- Experience of working within a regulated financial services organization
- Knowledge of AML, KYC and GDPR guidelines
- Outstanding interpersonal and communication skills
- GCSE English and Math's
- Computer literate
- Telephone sales and customer service experience, both inbound and outbound calls
- Good analytical skills
- Good written skills
- Efficient and accurate record keeping skills
- Proactive and solutions driven
- Highly organised with the ability to multi-task
- Able to use initiative to prioritise and complete tasks to deadline
- Flexible with a can-do attitude
- Ability to work to tight deadlines

## Benefits

- 23 days holiday, rising to 25, plus statutory bank/public holidays
- Birthday Leave
- Pension Scheme
- Healthcare
- Life cover
- Flexible working
- Employee Bonus Pool
- A relaxed and committed environment supported by an enthusiastic team

**Main Office**

Assetz House, Manchester Green  
335 Styal Road, Manchester M22 5LW

T 0800 470 0431  
E [enquiries@assetzcapital.co.uk](mailto:enquiries@assetzcapital.co.uk)  
W [assetzcapital.co.uk](http://assetzcapital.co.uk)

Assetz SME Capital Limited is a company registered in England and Wales with company number 08007287. Assetz SME Capital Ltd is authorised and regulated by the Financial Conduct Authority in respect of its peer-to-peer lending platform only. 'Assetz Capital' is a trading name of Assetz SME Capital Ltd. Assetz SME Capital is registered with the Office of the Information Commissioner (Reg No: Z3338899) for data protection purposes.

Assetz Capital also offers Coronavirus Business Interruption Loan Scheme ("CBILS") loans to corporate borrowers through Assetz Capital Lending Limited. Assetz Capital Lending Limited is a company registered in England and Wales with company number 12632494. Assetz Capital Lending Limited is not authorised or regulated by the Financial Conduct Authority. Assetz Capital Lending Limited is registered with the Office of the Information Commissioner (Reg No: ZA759694) for data protection purposes.