



APPOINTED LTD

FINANCIAL RECRUITMENT SPECIALIST

My Client

Well established financial planning firm in the heart of Southampton are expanding their successful team seeking a Appointment Maker to assist their successful planners in the production of 5* financial advice.

The Role

As the Appointment Maker you will be a crucial support to advisers and Business Development Managers (BDMs) by contacting clients via telephone and email to ensure they meet their monthly meeting goals. This is not a cold call role, as you are contacting clients who are already onboard with the business.

- Accepting calls from prospective clients as they arise
- Calling prospective clients using a list of phone numbers provided to you
- Familiarizing yourself with essential details of our products and services
- Field basic questions and concerns about the products and services
- Schedule consultations between the prospective client and an Adviser or BDM
- Keep a detailed log of calls, including those which were not answered

The Candidate

The ideal candidate will be a strong communicator with a excellent phone manner, you will have proven work experience as an Appointment Maker or similar role and posses outstanding listening skills and attention to detail.

The Package

This is a full time office based role, paying £25k with flexibility on home working when required. Progression opportunities within financial planning for the right candidate.

Please submit a application for further information or contact Chez Dunning directly.