

Personal Criteria

Essential

1. Numerical skills to understand financial matters, so that the individual is empowered to take personal action.
2. Must have a good foundation knowledge of pensions law and practice, gained in a pensions technical role.
3. Must have a thorough understanding of a broad range of pension arrangements, both occupational and personal, gained working in a pensions technical role.
4. An understanding and appreciation of wider retirement issues.
5. Proven ability in financial capability and an understanding of the issues consumers face in trying to manage their money.
6. Strong questioning skills and the ability to get to understand key client issues whilst maintaining structure and control during the course of a client interview.
7. Ability to translate complex ideas and topics into clear, concise and engaging content that the general public are able to understand.
8. Ability to identify connecting advice issues and assess an individual's ability to take action.
9. Effective communication skills. The ability to build a rapport, communicate confidently, sensitively and professionally, using oral and written techniques
10. Proven ability to work on own initiative – to monitor and maintain own standards and meet qualitative and quantitative targets for service delivery using proven organisational and time management skills.
11. Proven organisational and time management skills.
12. Flexibility and willingness to work as part of a team.
13. A commitment to on-going personal and professional development; we may require you to undertake training within the scope of the role.
14. Willingness to travel within the UK (including occasional overnights) and to work unsocial hours occasionally to meet tight timescales.
15. Proven ability to use IT packages

Desirable

1. APMI or CII qualifications or equivalent in related areas would be of benefit.

