

Position Description

Vacancy Title: **Brokerage Support Specialist**

Location:

Reports To: **None**

Objective

The Brokerage Support Specialist is an instrumental role in the Client Services team, that is responsible for initiating and managing new business processes, facilitating a smooth onboarding experience for clients, and providing ongoing support for existing accounts. The role reports to the Managing Director.

Outcomes

Organisational Stakeholders

1. Client Management

- New business processes initiated and successfully managed from application to setup
- Client satisfaction ensured through a seamless onboarding experience
- Renewal process for existing clients managed seamlessly, ensuring that services are continued without interruption.
- Professional customer service levels maintained to promote optimal client satisfaction

2. Financial reconciliation and coordination

- Claims processing coordinated effectively, working closely with clients and internal teams to ensure timely and satisfactory resolutions.
- Debit follow-up activities ensured, to manage and reconcile client accounts effectively.
 - Process refunds and manage credit allocations to ensure client satisfaction
 - Maintain accurate financial records.
- Unposted transactions monitored and resolved, ensuring all financial activities are accurately reflected in client accounts and internal records.

3. Administrative Support

- Reports and presentations for stakeholders prepared and presented in a timely manner
- Office correspondence handled professionally
- Office management protocols upheld
 - Efficient filing systems maintained
 - Office calendar managed efficiently, including setting up of meetings and appointments
- Stakeholder communication managed effectively
 - Act as the primary point of contact for all administrative inquiries
 - Maintain effective communication with internal and external stakeholders

4. Teamwork and cooperation

- Cooperation within the team and greater function / department
- Cooperation across functions / departments
- Work collaboratively to achieve the set targets and goals

5. Organisation's image and value standards demonstrated and promoted

- Collaborate with other teams in the organisation for the benefit of the organisation
- Monitor and encourage team members to uphold image and value standards
- Uphold and demonstrate the organisation's image and values

Responsibilities - Key Competencies

Competence	Description
Business	
Communication	Exchange information through verbal communication
Customer	
Customer Commitment	Demonstrate a commitment to customer service - both internal and external customers.
Relationship Building	Build beneficial relationships with suppliers and stakeholders.
People	
Facilitation	Assist the progress of work ensuring its timely and effective completion.
Problem Solving	Develop practical solutions to a situation.
Professional	

Competence	Description
Financial Application	Apply financial principles and practices.
Technology Application	Apply technology.

Qualifications

Qualification	Discipline	Notes
Preferred		
Degree	Business Administration, Finance	or related field

Work Knowledge and Experience

Minimum of 2 year's experience in brokerage support, financial services, or a similar role.

Strong understanding of financial processes and client account management.

Excellent communication and interpersonal skills, with the ability to manage multiple stakeholders.

Proficiency in MS Office, especially Excel, and experience with financial software and CRM systems.

Highly organized with a keen attention to detail and the ability to manage multiple tasks simultaneously.

Self-motivated, with a proactive approach to problem-solving and client service.

Requirements

Language Proficiency

Excellent command of English

Other Required Requirements

No other required items found.

Interactions

Type	Interaction	Comments
Internal		
	All employees	
External		
	Statutory Authorities	
	Customers	

Attributes

Behavioural Styles

Detail oriented	Attends to the small elements of a task/activity, ensuring completeness and accuracy.
Accountable	Assumes full responsibility for own actions and identifies with the success or failure of own part of the overall work/goal.
Integrity	Adherence to moral and ethical principles; soundness of moral character; honesty.

Interpersonal Styles

Team Oriented	Enjoys being with others as part of a group or team.
Self-sufficient and assured	Readily copes with situations without recourse/need of others, showing confidence and belief in oneself and one's own abilities.

Thinking Styles

Analytic	Able to separate things into their constituent elements in order to study or examine them, draw conclusions, or solve problems.
Disciplined/Systematic	Is controlled in conduct, shows an orderly pattern of behaviour, following a methodical and thorough approach.
Well organised	Controls tasks in a well thought out and critical manner.
Initiative	Takes action and makes decisions without the help or advice of other people.

How To Apply

Provide a current CV and cover letter clearly outlining your relevant experience. All applications must be submitted online via the link provided. Emailed applications will not be considered.

Contact for Enquiries

Contact Name: Leonarda Patterson

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Closing Date: 08 Dec 2024