



Candidate Specification

Client Service Analyst

May 2022



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Basic role information

Position:	Client Service Analyst
Based:	Office-based role with flexible working (2-3 days a week in the office) Offices in Newbury
Reports to:	Head of Client Services

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The role

Your responsibilities will include providing first line support to our growing number of clients either by phone or email.

You will need to understand in greater detail the issue the client is having and collate required screen shots/videos and record this succinctly on a ticket.

If you have the knowledge, you may be able to answer the question immediately or you may need to allocate the ticket to second line support or one of the technical teams for investigation. Once this investigation is complete, you will need to compile a reply to the client ensuring the information given is clear and concise and then make sure our internal systems are updated and the ticket closed.

You will also be involved with collating and distributing monthly/quarterly updates to our clients. From time to time, we may ask you to complete other activities that are needed that are within your skill set.

Location

This is a hybrid role, with a day a week in the office (or more if you choose). During the first month, there will be up to 3 days a week in the office.

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Required Skills

You will need the following skills:

- Questioning
- Listening
- Clear and concise communication
- Ability to work to a deadline

You will need to demonstrate the following:

- Professionalism
- Attention to detail
- Ability to keep calm under pressure
- Enquiring mind
- Being a team player but also be a self-starter
- IT literate

Required Knowledge and Experience

You should have:

- Minimum 5 GCSEs (or equivalent) to include Maths and English
- ITIL qualifications would be an advantage
- Team Player with the ability to adapt / “can do” attitude
- Client-focused

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The benefits of joining our exciting team

As well as offering fantastic opportunities for career progression once established in your role, you will be joining a friendly and relaxed working environment where you will be continuously supported and encouraged to reach your full potential. We have an open culture that enables you to find and fix problems and not pass them on to another team. We are a great environment for makers and builders.

Sound like you?

We have fantastic benefits, including

- 25 days annual leave, bank holidays, one extra 'company day' for Christmas, plus the option to buy a further five days annual leave
- Generous company pension scheme – 5% employer contribution
- Commission plan
- Private medical
- Fully qualified Mental Health First Aiders
- Long term disability and Life Insurance
- Study support policy
- Free parking
- A huge range of free hot and cold drinks
- Excellent fully funded company events
- Company football team and Table Tennis team
- Poker nights with pizza!
- The opportunity to support local charities



A little bit about us

At EV, we have operated as an independent organisation for over a decade, backed by a further 18 years of financial services consultative experience. We connect and empower our intermediary financial partners with intuitive, customer-centric advice and guidance software and investment solutions.

Powered by our proprietary market-leading stochastic asset model, our powerful calculations and strategic multi-asset allocations are used globally across the financial ecosystem by financial advisers, pension and platform providers, asset managers, banks, and building societies, to name but a few.

We have over 80 talented specialists working across offices in Newbury and London. We passionately believe our greatest assets are our talent and pride ourselves on attracting, developing, and engaging the best talent.

Every day, we bring collaboration, creativity, innovation, and passion that delivers better financial outcomes to all. We're a fast-paced, growing fintech that connects and empowers our clients with intuitive, customer-centric advice and guidance software and investment solutions.

And we're on the hunt for talented individuals that are forward-thinking, driven, and ready to make a real difference. Ready to write your next chapter with us? Then become part of the EV story.

We are EV. Join us today

Useful information

[Celebrating ten years in the EV journey: the events that shaped the Financial Services industry](#)

[EV Investment Solutions: When the going gets tough, the tough get going](#)

[EVPro: Game-changing holistic financial planning software for advisers](#)

[EV listed in WealthTech100 for the fourth consecutive year](#)

[Retirement Financial Planning: What will 2022 look like for guided consumer journeys?](#)

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