

Job specification

Client liaison

Contract position - Durban office

Key responsibilities

- Calling on members exiting, entering, retiring and nearing retirement from retirement funds.
- Providing the initial contact for benefit advice counselling.
- Contacting members who responded to the system generated SMS interface within 24 hours of the member responding.
- Referring leads to the GTC sales representatives that are generated when engaging with members during the benefit counselling process.
- Communicating with fund consultants and/or employers (companies that member's work for) in order to obtain outstanding contact information of members.
- Customer service and support during the counselling process.
- Comply with the GTC processes and procedures relating to the counselling process which includes complying with the Workflow system requirements.

Qualifications, skills and experience required

- Matric.
- Good working knowledge of MS Office (Word, Excel, PowerPoint, Outlook).
- Financial services experience.
- Customer service training (written and verbal).

Personal attributes

- Excellent telephone manner.
- Strong client service focus.
- Provide recommendations/suggestions on ways to improve the over-all client experience.
- Ability to work independently.
- Initiative.
- Time management skills.
- Attention to detail.

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An Authorised Financial
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GTC Group products and services include: Employee Benefits Consulting • Employee Benefits Administration • Private Client Wealth Management
• Healthcare Consulting • Short-Term Risk Solutions • Stockbroking • Derivatives Trading • Unit Trust Management • Asset Management • Fiduciary Services

- Professional at all times.
- Friendly and helpful.
- Proactive.
- Excellent organisational skills.
- Ability to interact with GTC staff and clients professionally, both verbally and in writing at all times.
- Ability to work under pressure.

Office hours

- 08:00 – 17:00.
- There will be occasions where the incumbent would need to work overtime.

Apply

To apply for this position please send your CV and supporting documents to recruitment@gtc.co.za by 31 January 2020 and quote reference number **559918**.