



Role Profile

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| Job Title | Group Head of Private Clients | Name | TBC |
| Reports To | Group Director | Region | Head Office |
| Location | Bradford | | |

Summary & Purpose

Responsible for the success and development of the Private Client Insurance broking division across the UK in line with the Group Strategy, to achieve desired results.

Objectives & Responsibilities

1. To develop a service proposition to the very highest standards as most attractive to wealthy individuals in their personal capacity, and work to ensure the TLD Private Client service meets these standards consistently (for both existing and new Clients). Specifically considering:
 - a. Communications style, scope and timings.
 - b. Quality of advice given and suitability of cover solutions proposed.
 - c. Client Relationship building
 - d. 'Above and Beyond' support given to Clients wherever possible, including but not limited to liaising with third parties on Client's behalf.
 - e. Insurer Relationship building including negotiation of beneficial and exclusive cover, products and/or pricing perks.
 - f. Close working relationship with TLD Claims Team(s) to ensure Private Client Claims have best possible outcomes.
 - g. Ensuring Compliance objectives achieved
2. To grow the TLD Private Client books in the UK through:
 - a. Personal Contacts and Networks
 - b. Developing arrangements with suitable Introducers and other Affinity opportunities
 - c. Promoting the PCD team to the Commercial, Credit and IFS Departments as well as other TLD branches to facilitate New Business referrals (and provide in reverse wherever possible)
 - d. Recruiting Private Client Account Executives where opportunity presents and individuals fit the TLD culture
 - e. Exploring other geographical areas with strong High Net Worth individuals populations; reviewing opportunities to expand into those areas, potentially by recruitment, acquisition, or other means (starting with regions where TLD already have offices).
 - f. Marketing campaigns
 - g. Encouraging and increasing Client referrals.
 - h. Supporting other Private Client Brokers / Managers with Development roles throughout the Group pursuing above routes themselves.

3. To develop the TLD Private Clients 'branding' to support and reflect the above service standards as well as the wider T L Dallas standards and values.
4. To raise the TLD Private Client Brand Profile in key regions and nationwide through PR, marketing, appropriate sponsorship, and/or advertising.
5. To ensure the Private Client teams are happy and rewarding places to work for all, including but not limited to:
 - a. Full support of TLD values
 - b. Awareness and support of individual's personal and professional development
 - c. Active promotion of positive team spirit and morale, including 'out of work' support and social events.
 - d. Fair allocation of work loads
 - e. Appropriate and fair remuneration, bonus incentives and other benefits / perks.
 - f. Sufficiently resourced teams, both with personnel and efficient systems.
6. To ensure the Private Clients Departments operate profitably (excluding any planned investments awaiting return) and seek to improve the Medium to Long Term Profitability.
7. To work closely with other TLD Managers, Directors and Boards to develop and agree the Strategy and Budget to achieve the above objectives, and production and delivery of appropriate reporting to monitor progress.

Skills identified which are essential to perform this role effectively.

- i. Strong Communication and People skills
- ii. Strong Presentation skills (on paper and in person)
- iii. Networking skills
- iv. Good experience with Private Client individuals
- v. Good knowledge of Household and Personal Lines insurance
- vi. Persuasion, influencing skills
- vii. Team supervisory skills
- viii. Customer service
- ix. Time management
- x. Understanding and following company processes and procedures
- xi. Basic level (or higher) of Numeracy and IT skills
- xii. Happy to travel throughout UK

