

Finance Assistant

This is a unique and exciting opportunity to join Freedom Health Insurance – a trusted independent private medical insurance company based in Poole, Dorset that is rapidly growing both in the UK and internationally. We are looking to strengthen and expand our presence in the private medical market and deliver an outstanding client experience through all stages. That is why we are looking to recruit a full-time Finance Assistant who can help us achieve this goal through excellent communication skills and passion for customer service.

About the role

The finance team are responsible for all aspects of cash, commissions and MI reporting across the Business.

The role requires accuracy, capability to work with high volumes, attention to detail and ensuring the in-house system is maintained accurately and kept up-to-date.

There will be contact with brokers/policyholders regarding non-payment of premium and to ensure all policies are paid up to date and / or within the agreed payment terms. Therefore, the role requires excellent communication skills whilst maintaining a high level of customer service and professionalism at all times. The Finance Assistant will be dealing with sensitive information so a high level of confidentiality must always be carried out.

As there is a high volume of German based policies, being fluent in the German language would be beneficial.

You will need to have knowledge of credit control, have finance function knowledge and have high proficiency in Excel.

Key responsibilities

Technical and operational responsibilities & skill set

- Contacting customers to collect outstanding payments by phone and correspondence, ensuring ledgers are chased to agree timescales.
- Ability to establish good working relationships internally and externally.
- Working with the underwriting dept. and external brokers to ensure customer premiums are up to date whilst maintaining a high level of customer service.
- Computer literate or proficient in the use of Microsoft Office with intermediate/advance level in Excel.
- Monthly system reconciliations.
- Working on the banking system to check for payments, send invoices and allocate monies received in the internal database.
- Maintaining accurate and up-to-date payment records in a timely manner.
- Investigate and resolve queries.
- Chase non-payments via the correct process.
- Ensuring all relevant payment information is included in the Client files
- Provide income forecast to assist Finance with cashflow forecast reports.

- Provide outstanding premium reports to the Finance Manager and Brokers on a monthly basis.
- Support the finance team in the execution of company credit policies.
- Work alongside others in the team, communicating the status of non-payment policies, ensuring the correct process is being followed.
- Support the Finance manager with the Company Bordeaux reports.
- Provide adhoc reports as when required to support the business needs.
- Any filing and other duties as and when required.
- Provide adhoc support to the Underwriting team when required.

Education and experience

- Minimum of 2 years' experience within a Credit Control Role.
- Experience with working within a Finance department
- Preference in being fluent in German but not essential.
- Preferably with experience of working in the private medical insurance sector.
- Experience in working with in-house systems.
- High level of Excel skills.
- Preferably AAT Qualification or studying towards AAT.

Personal characteristics

This is an important role in a small finance team working in a friendly office environment in Poole - Dorset, for a company that provides private medical insurance to a wide range of customers both in the UK and overseas. Our business is expanding and so we are looking for an effective and competent Finance Assistant to join us.

You must have excellent communication skills, over the phone and in writing and be confident with telephone debt collection.

In addition, you must be prepared to participate and be an active part of the team. All members of the finance team are required to work together and support each other to ensure we operate smoothly and efficiently and provide the high level of customer service we always aim to give. This means you must be:

- able to work well under pressure and in the face of short deadlines with high volumes;
- have a methodical and accurate working style
- flexible and approachable, adapting and responding to team objectives at short notice;
- well organised and able to prioritise a workload of varied and important tasks; and
- be self-motivated and able to work on your own with minimal supervision as well as an integral part of the team.
- Ability to identify opportunities for process improvement without compromising quality of work.

The normal office hours are 9am to 5:30pm. In return, you will receive a competitive salary and 25 days holiday plus bank holidays.

To apply, please send your CV to Nicola Paterson at n.paterson@freedomhealthinsurance.co.uk