

Relationship Manager (Endorsed CPD)

Based in the City of London and remotely

Salary: c.£30,000pa to £33,000pa, depending on your skills

Plus £7.5% company pension contribution

A travel allowance of £2,500 per annum

Hybrid working arrangements

Discretionary Bonus

The CISI's Continuing Professional Development (CPD) scheme, ensures our members maintain their professional competence. External firms can apply to have their own CPD scheme accredited as CISI "Endorsed CPD" if their CPD meets the CISI's rigorous CPD standards. Completing Endorsed CPD contributes towards the CPD requirements that CISI sets all our members.

You will be:

- Responsible for the endorsed CPD renewals and endorsed CPD administration including reviewing applications, managing the inbox, updating spreadsheets, income/budget, logging events, raising agreements and invoicing.
- Ensure timely and efficient administration of endorsements and acting as the primary customer service point of contact for endorsed CPD.
- Co-ordinating relationships with firms, identifying other business and membership opportunities.
- Working with the wider BD team to increase income, update numbers, and support with renewals.
- Developing membership opportunities from sponsors, corporate supports and CPD endorsement firms.
- Keeping the website update to date with firm logos and endorsed events.
- Providing general administrative support to the events team, including launching webinars, logging CPD, and responding to enquiries.
- Acting as key liaison between BD and Events.

The following skills and experience are required:

- 2+ years' experience in a professional role involving client relationship management
- Strong organisation and time management skills, with the ability to prioritise your own workload and work independently.
- Good interpersonal skills; you will be liaising with external firms and candidates at all levels.
- Judgement skills – the ability to review documentation against relevant criteria and make a judgment on whether the criteria have been met.
- Good grammar, spelling, drafting and writing ability.
- Strong IT skills – word, excel, and familiarity with databases.
- Attention to detail and able to work to deadlines.

We offer a competitive remuneration package, which includes:

- 7½% company pension contribution into a personal pension, in addition to your own contribution of 1½% via salary exchange
- Life insurance and income protection insurance
- A Wellness Allowance of up to £30 a month
- 26 days leave per annum (which includes the institute closing for three days between Christmas and New Year).
- A travel allowance after passing probation which has a minimum value of £2,500 per annum
- Hybrid working arrangements.

Please send your CV, salary expectation and availability to HR at jobs@cisi.org

Candidate Adjustments

At CISI we encourage applications from a neurodiverse workforce so please do reach out to HR@cisi.org to discuss reasonable adjustments if required.

Our London office is open plan with agile desk booking; however, we are able to arrange reasonable adjustments for candidates that require a fixed working space.

We value the contribution that employees with different views and experience bring to the Institute and are committed to promoting equality, inclusion and diversity. We hope to receive applications from a wide range of talented people irrespective of their race, religion or belief, gender, age, gender identity, neurodiversity, disability, sexual orientation, ethnic origin, political belief, social class, relationship status or caring responsibilities.

The Chartered Institute for Securities & Investment is the leading professional body for securities, investment, wealth and financial planning professionals. Formed in 1992 by London Stock Exchange practitioners, we have a global community, which aims to promote high standards of competence and integrity to more than 40,000 members in 116 countries. We are also the main examining body for the sector, offering our internationally recognised exams globally.

Its purpose is *"To champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services."*

For more information on the CISI, please see our website at www.cisi.org