



Shepherds Friendly is a modern mutual society, offering a variety of adult and children's financial products and services such as ISAs, savings plans, life insurance and income protection. Located in south Manchester in the heart of Cheadle village, the Society has been providing financial security to members for almost 200 years.

Guided by our values of working together, doing the right thing, and making a difference, we are committed to delivering a service which helps our members plan their finances and secure their family's future. In a world of financial complexity, we believe in the power of simplicity.

We are currently recruiting for a **Claims Assessor** within the **Claims Department** to join our team of talented individuals.

Role Purpose:

The Claims Assessor is responsible for managing and assessing insurance claims, ensuring they are processed accurately, fairly and in line with policy terms and regulatory requirements. The role delivers high quality customer service, supports members through the claims journey and contributes to positive customer outcomes.

Key Accountabilities:

- Managing a caseload of claims across Income Protection, Critical Illness and Life products, ensuring accurate and timely processing.
- Assessing claims in line with policy terms, internal procedures and defined authority limits.
- Maintaining clear, consistent communication with members and stakeholders throughout the claims process.
- Handling inbound and outbound communications, including telephony interactions, in a professional and proactive manner.
- Ensuring all claims are recorded accurately within internal systems, maintaining high standards of data quality and documentation.
- Meeting agreed performance targets relating to quality, accuracy, timeliness and volume of work.
- Working collaboratively with internal teams and external partners to support effective claims management.
- Maintaining up to date knowledge of products, claims processes and market practices.
- Identifying and logging risks within the claims function in line with organisational processes

Stakeholder & Relationship Management:

- Providing a high quality service to members, their representatives and intermediaries (IFAs).
- Liaising with external claims partners and service providers where required.
- Collaborating with colleagues across the claims team and wider business to support delivery of claims processes.
- Communicating clearly and effectively with a range of stakeholders.

Governance, Risk & Compliance

- Ensuring claims are processed in line with FCA/PRA requirements, Consumer Duty principles and Treating Customers Fairly.
- Following claims procedures and governance frameworks to ensure consistent, compliant decision making.

- Maintaining accurate records and audit trails for all claims activity.
- Identifying, escalating and supporting the management of risks within claims handling.

Knowledge, Experience & Qualifications:

Essential:

- Basic level of education (e.g. GCSEs including Maths and English).
- Strong communication and interpersonal skills.
- Ability to manage workload, prioritise tasks and meet deadlines.
- High attention to detail and accuracy.

Desirable:

- Knowledge of insurance products (income protection, life, critical illness).
- Relevant industry qualification (e.g. CII) or willingness to work towards one.
- Understanding of claims processes or customer service experience in financial services.

Skills & Capabilities:

- Strong customer service and communication skills.
- Attention to detail and accuracy in decision making.
- Organisational and time management capability.
- Ability to manage multiple cases and deadlines.
- Teamworking and collaboration skills.
- Professional, empathetic approach when dealing with sensitive situations.

Most importantly, we offer:

- Salary: Competitive
- Company Pension Scheme – 8% employer contribution
- Flexible working hours
- 25 days annual leave plus bank holidays
- An extra day off for your birthday
- Access to wellbeing support services through Nuffield Health and Health Assured including access to 24/7 online GP, discounted gym membership, mental health support, free eye tests and flu vaccinations.
- Company benefits including life insurance, healthcare cash plan, four paid well-being days, and various social and charitable events throughout the year including a volunteering day at a charity of your choice.
- Optional benefits including cycle to work scheme, holiday trading, etc.
- 4pm finish on Friday!

If you think this role would be a great fit for you, please submit your CV and cover letter quoting DIRECT to careers@shepherdsfriendly.co.uk For further information, please contact 0800526249.

Diversity, Equality and Inclusion

The Society strives to build and nurture an inclusive culture that encourages, supports and celebrates the diverse voices of our people to connect with our members and the communities we serve. We offer a range of family friendly, inclusive employment policies and practices, flexible working arrangements, employee engagement initiatives and office facilities and services to support people from different backgrounds.