

# **Tamworth Co-operative Society Limited**

## **Pre-paid funeral plan / memorial masonry consultant**

**Responsible for:** Sale and administration of Pre-Paid Funeral Plans and Memorial Masonry

**Responsible to:** Funeral Management Team

### **Principle Duties**

- Have a professional appearance dressed in company uniform provided.
- Reflect the professional image of the society by following the policies and procedures as set out in the society hand book and funeral department work book.
- Demonstrate empathy, compassion and caring approach to clients.
- Follow client confidentiality and current GDPR guidelines.
- Support visitors with practical and emotional support during branch visits.
- Support other departments as and when required.
- Confident telephone and face to face manner.
- Other ad-hoc duties that may be required by the need of the business

### **Pre-paid funeral plans**

- Obtain and hold Financial Conduct Authority references (DBS)
- Hold a detailed understanding of funeral plan regulation as set out by the FCA
- Have a confident knowledge of funeral plan products and services the funeral department can provide.
- Be capable of using the funeral management system including, data input, posting payments, raising invoices, and data search.
- Professionally liaise with 3<sup>rd</sup> party agencies to produce a pre-paid funeral plan products to the client's satisfaction.
- Be responsible for payments made by clients. This includes cash, Cheque and card payments.
- Community support and promotion.
- A confident understanding of prepaid funeral products offered by other providers.

### **Memorial masonry**

- Demonstrate a confident understanding of how a memorial is created.
- Hold a detailed knowledge of memorial products Tamworth cooperative funeral service can offer.
- Be able to create accurate quotations and manage accounts.
- Liaise with 3<sup>rd</sup> parties such as suppliers, bereavement offices and masons.

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- Understand the variety of permit regulations which apply to the locations the society operates.
- Maintain a constant through put of orders.
- Be able to conduct on site memorial inspections.

End.