TH March
Insurance Since 1887

JOB DESCRIPTION

Job Title: Executive Assistant to the Managing Director

Department: Administration

Reporting to: Managing Director

Location: National Service Centre

TH MARCH COMPANY VALUES:

The post holder will be expected to operate in line with our workplace values which are:

- **WE PUT CUSTOMERS FIRST**
  We value customer relationships & listen carefully to understand their requirements.

- **WE DO THE RIGHT THING**
  Acting with honesty and integrity, we are fair and respectful in everything that we do.

- **WE LOOK FOR SOLUTIONS**
  We enjoy helping our customers, partners and colleagues find answers and solutions to their requirements or problems and are committed to the customers and trades in which we specialise.

- **WE ARE A TEAM**
  We take pride in our accomplishments. We support each other, sharing our knowledge and experiences, always striving to achieve the highest possible standards.

PURPOSE OF ROLE:

To undertake designated Executive Assistant duties in accordance within the Managing Directors requirements.

JOB COMPETENCIES:

Responsibilities:

Executive & Administrative Support

- Provide full, confidential PA support to the Managing Director (MD).
- Manage and optimise a busy diary, prioritising meetings in line with MD requirements and company objectives.
- Proactively manage and optimise the MD's email inbox, using rules and filters to prioritise communications and ensure timely responses in accordance with agreed delegation arrangements.

- Coordinate internal and external meetings, including agenda preparation, briefing packs, presentations, and minute taking, where required.
- As and when requested by the MD, attend key meetings to take minutes and turn action items into follow-ups.
- Ensure commitments are tracked — internal and external — and followed up on.
- Act as gatekeeper, managing communications and ensuring timely responses.
- Analyse data across various areas of the company, creating and maintaining spreadsheets to provide regular updates.
- Conduct in-depth research on behalf of the MD to gather information and identify opportunities for improvement.
- Transcribe dictated information accurately and efficiently.
- Review, organise and format documentation to ensure all materials are accurate, professional, and presentable.

Travel & Event Coordination

- Arrange detailed optimum travel itineraries, including accommodation, where required.
- Prepare comprehensive travel packs and briefing materials.
- Organise and coordinate internal leadership meetings, board meetings, and offsite events.
- Support planning and execution of company-wide events, client functions, and industry conferences in conjunction with the Marketing Team and HR Team, where required.

Project & Stakeholder Coordination

- Liaise closely with the HR Team on an ongoing basis, as and when required.
- Liaise closely with the Business Innovation and Project Management Team and Department Heads to ensure deliverables are on schedule.
- Support the MD in tracking strategic projects and key initiatives.
- Monitor progress of priority actions and proactively follow up on outstanding items.
- Prepare and maintain project dashboards, reports, and status updates for the MD.
- Ensure the MD is fully briefed and up to date on key developments, risks, and milestones.

Account Handling

- Handle queries from clients and act as point of contact for the MD as and when required.
- Deal with enquiries and insurance renewal account handling on behalf of the MD as and when required.

Governance & Reporting

- Assist in preparation of board and executive committee materials.
- Maintain accurate records of key decisions and action points.
- Ensure the MD is up to date with regulatory, compliance, and governance updates and documentation as required within an insurance brokerage environment.

Relationship Management

- Build and maintain strong and effective relationships with internal and external stakeholders, including the Board of Directors, Senior Leadership Team & Regional Development Manager members, Department Heads, clients, insurers, and strategic partners.
- Represent the MD professionally in interactions with clients, insurers, and external partners.
- To maintain the Company's and clients' confidentiality at all times.
- To fully understand TH March Policies and Procedures and ensure they are adhered to.
- To comply with the Company Policy on Information Security and Acceptable Use.
- To undertake all other duties as reasonably required and directed.

<u>Behaviours:</u>

- To embrace and behave in line with TH March Values.
- To comply with FCA Regulations.
- To comply with the FCA's Treating Customers Fairly principle including:
- Acting in an honest and open manner at all times with both clients and the Company.
- Acting with integrity by demonstrating fairness and impartiality.
- Demonstrating a client focussed approach.
- To ensure that company transactions are conducted in a way that is clear and straightforward.
- To treat everyone with dignity and respect.
- To enhance your role by undertaking appropriate training and personal development courses, as required.

<u>Skills Required:</u>

- Proven experience as an Executive Assistant supporting C-suite or Managing Director level.

- Experience within insurance, financial services, or a regulated environment is highly desirable.
- Exceptional organisational and time management skills.
- Exceptional attention to detail and accuracy, with the ability to produce accurate, high-quality work while managing multiple priorities.
- Strong written and verbal communication skills.
- High level of discretion and confidentiality.
- Ability to manage multiple priorities under pressure.
- Strong project coordination and stakeholder management capability.
- Advanced proficiency in Microsoft Office (Outlook, PowerPoint, Excel, Word).
- Ability to demonstrate, understanding and apply TH March values. These are embedded in all roles.
- Demonstrable experience handling highly confidential and sensitive information.