JOB SPECIFICATION

JOB TITLE: CLIENT SERVICES EXECUTIVE
TEAM: CONCIERGE
SALARY: Competitive
POSITION: FULL-TIME
PROBATION: 6 months
HOURS: 9am to 5pm (1 hour for lunch daily)
LOCATION: HYBRID (after successful completion of initial 3 month in-person training at the office)
3 days HOME
2 days OFFICE – Tugby Orchards, Wood Lane, Tugby, Leics LE7 9WE (from Oct 2026)

Compass: Building the Future of Property Tax
Join Compass and become part of a dynamic fintech company that's transforming the way stamp duty is handled. We are passionate about innovation and committed to making a tangible impact in the property tax industry. At Compass, you will have the opportunity to work with a talented team, leverage cutting-edge technology, and contribute to meaningful change. We value creativity, collaboration, and continuous learning, offering a supportive environment where your ideas can thrive. Be a part of our exciting journey and help us build a brighter future for property tax.

JOB PURPOSE
As a Client Services Executive for Concierge, you will be responsible for supporting clients though the Stamp Duty Land Tax (SDLT) questionnaire process, reviewing their information, and ensuring the correct SDLT position is identified. This is a client-facing role requiring very strong communication skills, high attention to detail, and the ability to apply structured guidance to real-world scenarios.

KEY RESPONSIBILITIES:

- **Client Communication & Support**
  - Act as a primary point of contact for clients during the SDLT calculation process
  - Support clients via phone and email to complete SDLT questionnaires accurately
  - Conduct review calls with clients to confirm details and clarify responses
  - Liaise with solicitors and conveyancers to provide updates and resolve queries

- **SDLT Calculations & Review**
  - Review completed questionnaires for accuracy and completeness
  - Identify inconsistencies or missing information and resolve these with clients
  - Apply SDLT rules and guidance to determine the correct tax treatment
  - Clearly document calculation decisions and reasoning

- **Quality & Collaboration**
  - Escalate technical or unclear points appropriately using internal guidance
  - Participate in four-eyes checks on SDLT returns as part of quality control

- **Administration & Reporting**
  - Maintain accurate records within Compass systems
  - Log client interactions and calls accurately
  - Support internal reporting and audits as required

Essential Skills & Qualities

- Very strong/clear communication skills, particularly by phone
- High attention to detail and accuracy
- Confident handling client queries in a professional manner
- Ability to follow structured guidance and escalate when unsure
- Comfortable working with digital systems and case management tools
- Ability to manage multiple matters concurrently

Nice-to-Have Skills

- Experience in property, legal, or financial services
- Familiarity with SDLT or conveyancing processes
- Previous client-facing or call-based experience

Benefits:

- Nest Pension Plan 90 days post commencement
- Free annual eye check
- Free parking at the office
- Bonus structure (details will be given upon commencement)
- Private Health Insurance (via salary sacrifice 90 days post commencement)

Holidays:

- 23 days per annum – first year
- 24 days per annum – second year
- 25 days per annum – third year
- Office is closed between 27th – 31st Dec which uses 3 annual leave days
- Plus Statutory Bank Holidays

Last Updated: 27.08.26