

Client Services Associate ~ 26k (J1155)

Description

This IFA Company was established in 2009, with the aim to provide a unique and modern approach to financial planning for high net worth Individuals and the employee benefit market.

They were awarded Chartered status from the Chartered Insurance Institute in 2013, showing their commitment to high levels of standards and professionalism.

The firm have exciting growth plans over the next 5 years and wants to expand its highly valued Business Support team to support its team of client facing advisers.

You will be:

- Self-driven, results-oriented with a positive outlook.
- A natural forward planner who critically assesses own performance.
- Good at understanding compliance issues.
- Reliable, tolerant, and determined.
- Keen for new experiences, responsibility and accountability.
- Able to get on with others and be a team-player.

Responsibilities

- Responsible for administration within the IFA Client Services Team and providing support to the Paraplanners within the team.
- Receiving and acting on instructions from adviser's and paraplanners following client meetings.
- Maintaining accurate records using the internal back office system.
- Creating and producing letters, suitability reports and invoices.
- Carrying out all tasks in a manner consistent including processing new business in line with compliance procedures.
- Obtaining illustrations and product information from providers
- Liaising with clients and product providers on outstanding documents and queries.
- Preparation of existing client valuations / files ready for reviews.
- Process of new business.
- Ensuring all client files are compliant on an ongoing basis.

Qualifications

Ideally working towards level 4 Diploma

Good level of Investment and Pension knowledge

Experience

Employment Type

Full Time / Flexible Hours

Beginning of employment

ASAP

Duration of employment

Permanent

Industry

Financial Planning

Working Hours

8am – 4pm

9am – 5pm

10am – 6pm

Base Salary

£ 22,000 - £ 26,000

Date posted

August 12, 2020

Valid through

30.09.2020

- At least 2 years' experience working in a Business Support role, for a financial planning organisation.
- Experience of using computer based management systems including Wrap/Platforms.
- Computer literate, conscientious and have a good attention to detail.
- Clear understanding of the financial planning process.
- Excellent communication skills, both written and verbal
- Able to work within defined business processes.
- Ability to achieve agreed outcomes without supervision.
- Prioritise own work load, and the work load of the Business Support team.
- Ability to multi task and prioritise effectively and assist in ad-hoc projects when required.
- A good working knowledge of platforms, protection, pensions and investment products.
- Proficient in using MS Excel, Outlook, Word and Intelligent office.

Job Benefits

- Competitive salary based on experience and qualifications. (up to £26,000)
- 23 days holiday
- Free parking
- 4 x Death in Service Benefit
- Employer Pension Contributions
- Flexible working
- Financial support to encourage study for further advancement within the business.

Contacts

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