

Client Services Manager (J1160)

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 or achieved level 4 Diploma

Experience

Employment Type

Beginning of employment
ASAP

Duration of employment
Permanent

Industry
Financial Planning

Working Hours
8am – 4pm
9am – 5pm
10am – 6pm

Base Salary
£ 27,000 - £ 30,000

Date posted
January 15, 2021

Valid through
30.12.2020

- At least 3 years' experience working in a Business Support role for a financial planning organisation.
- Experience of using computer based management systems including a full understanding of Wrap/Platforms.
- Computer literate, conscientious and have a good attention to detail.

Job Benefits

- Competitive salary based on experience and qualifications.
- 25 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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