

Financial Services Administrator

We are financial advice and accountancy company, based in Brighton and looking for an experienced IFA Support Administrator to complete our team on a full-time basis.

The successful applicant will support the Independent Financial Advisors in all aspects of pre and post advice to provide clients with a first-class financial advisory service. The role allows progression in terms of acquiring industry qualifications and developing your technical product knowledge. You will be working with a focus on pensions, investments and life products. Full training will be provided but you must have experience working in a support role within a financial advice or life and pension company. You must be organised, be able to manage your work load, and be comfortable talking to clients and companies.

The role will include:

- Appointment making/telephone calls to clients, prospects and third parties.
- Contacting clients, providers and third parties by email, phone and letter.
- Telephone answering and message taking.
- Diary and task management.
- Diligent use of our back-office systems to record client details, tasks, plans etc.
- Liaising with product providers to obtain and chase information.
- Processing new business applications, both paper-based and online, then seeing cases through to completion.
- Pipeline chasing, client, adviser and lender liaison when required.
- Meeting preparation documentation.
- Chasing up Letters of Authority/liasing with providers.
- General office duties to include scanning, filing, photocopying and preparing drinks for clients and advisers.
- Administrative duties to support financial adviser and paraplanner.
- Completing in house training.
- Adhering to compliance procedures and company policy.

Candidate requirements:

- Minimum of 2 years industry experience, preferable
- Experience and basic product knowledge of pensions, investments and protection.
- Working knowledge of administering the above products.
- Proficient administrator, organised with good communication skills, be able to work happily within a team and under their own initiative, occasionally under pressure.
- Conscientious and detail orientated.
- Organisational skills with the ability to prioritise workloads.
- Ability to use initiative and look for alternative solutions.
- Efficient typing skills.
- PC literate with the ability to use standard Microsoft products Word, Excel, PowerPoint, Outlook to a good standard.
- GCSE in Maths and English of C or above.
- Fluent in written and spoken English.
- Good telephone manner.
- Friendly, approachable and personable.

Preferred attributes:

- Experience of Novia, Old Mutual Wealth, Fidelity, Standard Life and Aviva platforms.

Job Type: **Full time**

Salary: £20,000 p.a. (negotiable depending on experience)